

**From:** [Dunlop, Becky Norton](#)  
**To:** [Suhr, Daniel R - LTGOV](#); [Hilboldt, John](#)  
**Cc:** [Springer, Jessica](#)  
**Subject:** Re: Lt. Gov. Kleefisch Visit Heritage?  
**Date:** Friday, February 7, 2014 1:25:15 PM

---

Yes! Love to try and do both a speech by her and host a lunch...perhaps with a wider circle of folks. I am copying John Hilboldt who directs our Lectures program. He can work with you on timing. Jessica keeps my schedule so she will be helping on this. Miss you here. Becky

---

**Becky Norton Dunlop**  
*Vice President, External Relations*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-546-4400  
[heritage.org](http://heritage.org)

---

**From:** Suhr, Daniel R - LTGOV [mailto:[Daniel.Suhr@wisconsin.gov](mailto:Daniel.Suhr@wisconsin.gov)]  
**Sent:** Friday, February 07, 2014 02:20 PM  
**To:** Dunlop, Becky Norton  
**Subject:** Lt. Gov. Kleefisch Visit Heritage?

Dear Becky,

Good afternoon. I'm writing on behalf of another Becky, Wisconsin's Lt. Governor Rebecca Kleefisch. Last year the Lt. Governor met with Heritage's executive team during a trip to D.C. and really enjoyed her time at the Foundation. The Lt. Governor is going to be back in D.C. next month for the NLGA, and I'm writing to see if Heritage would be interested in hosting her again. In particular, I wanted to ask if Heritage could provide a forum for the Lt. Governor to give remarks on Wisconsin's recent economic success and our plan to give the subsequent revenue surplus back in the form of major tax relief (for an outline of the tax plan, see <http://walker.wi.gov/newsroom/press-release/governor-scott-walker-delivers-remarks-wmc-business-day-madison>). Wisconsin's got a great story to tell, and we'd love to share it at Heritage. We have lots of flexibility on her calendar for March 19, 20, and 21. Please call me at [REDACTED] to discuss this or other possibilities for her to engage with Heritage while in D.C.

Hope you're enjoying Sarasota and CNP – sorry I couldn't be there for this one. I'll see you in March hopefully and then again in May in McLean.

Thanks – DANIEL

Daniel R. Suhr, Chief of Staff  
Lt. Governor Rebecca Kleefisch  
608.266.3516 (office)

**From:** [Dunlop, Becky Norton](#)  
**To:** [Hilboldt, John](#); [Suhr, Daniel R - LTGOV](#)  
**Cc:** [Springer, Jessica](#); [Pfitzenmaier, Heather](#); [Schrader, Angelise](#)  
**Subject:** Re: Lt. Gov. Kleefisch Visit Heritage?  
**Date:** Monday, February 10, 2014 10:46:52 AM

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This would be great. Will turn out our interns as well. They should hear this message of success. Will organize lunch following address.

---

**Becky Norton Dunlop**  
*Vice President, External Relations*  
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---

**From:** Hilboldt, John  
**Sent:** Monday, February 10, 2014 11:14 AM  
**To:** Suhr, Daniel R - LTGOV <[Daniel.Suhr@wisconsin.gov](mailto:Daniel.Suhr@wisconsin.gov)>; Dunlop, Becky Norton  
**Cc:** Springer, Jessica  
**Subject:** RE: Lt. Gov. Kleefisch Visit Heritage?

Daniel,

March 20 is perfect for our schedule. If agreeable, a 12 noon lecture would work best for audiences, followed by a private luncheon. Second preference would be an 11 a.m. program. Let me know if these would work. If not, I'm happy to discuss other times best for the Lt. Governor.

---

**John Edward Hilboldt**  
*Director, Lectures & Seminars*  
x6075

---

**From:** Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]  
**Sent:** Friday, February 07, 2014 3:37 PM  
**To:** Dunlop, Becky Norton; Hilboldt, John  
**Cc:** Springer, Jessica  
**Subject:** RE: Lt. Gov. Kleefisch Visit Heritage?

Great, thanks Becky.

John and Jessica, if we're to do a lunch and a speech our best day would be Thursday, March 20. If that doesn't work, on Wednesday, March 19, we could do a late lunch (115pm) followed by a 2 or 230 speech. If that doesn't work, we can look at a breakfast or coffee meeting with staff and then a speech. The Lt. Governor is also a big fan of Stephen Moore, who joined your Foundation recently, if he is available for the staff discussion.

Thanks,

DANIEL

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**Cc:** Springer, Jessica

**Subject:** Re: Lt. Gov. Kleefisch Visit Heritage?

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Daniel R. Suhr, Chief of Staff

Lt. Governor Rebecca Kleefisch

608.266.3516 (office)

**From:** [Hilboldt, John](#)  
**To:** [Suhr, Daniel R - LTGOV](#); [Dunlop, Becky Norton](#)  
**Cc:** [Springer, Jessica](#)  
**Subject:** RE: Lt. Gov. Kleefisch Visit Heritage?  
**Date:** Monday, February 10, 2014 3:19:13 PM

---

Daniel –

Confirmed. I will send you a draft of our invitation language for your review.

---

**John Edward Hilboldt**  
*Director, Lectures & Seminars*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6075  
[heritage.org](http://heritage.org)

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**From:** Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]  
**Sent:** Monday, February 10, 2014 4:17 PM  
**To:** Hilboldt, John; Dunlop, Becky Norton  
**Cc:** Springer, Jessica  
**Subject:** RE: Lt. Gov. Kleefisch Visit Heritage?

That's great John. Let's do a noon lecture followed by the luncheon on Thursday, March 20. I imagine we'd use the 1<sup>st</sup> floor lecture hall for an event like this given our likely attendance, but defer to you entirely on that point. I'll plan on her being at Heritage from 1145 to 215 if that works for you. We can be in touch when the day gets close to lock down any final details about security & parking, etc. Please let me know if you need anything for promotional purposes – our general theme will be something about tax relief and reform. Thanks much – DANIEL

---

**From:** Hilboldt, John [<mailto:john.hilboldt@heritage.org>]  
**Sent:** Monday, February 10, 2014 10:15 AM  
**To:** Suhr, Daniel R - LTGOV; Dunlop, Becky Norton  
**Cc:** Springer, Jessica  
**Subject:** RE: Lt. Gov. Kleefisch Visit Heritage?

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DANIEL

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Daniel R. Suhr, Chief of Staff  
Lt. Governor Rebecca Kleefisch  
608.266.3516 (office)

**From:** [Suhr, Daniel R - LTGOV](#)  
**To:** ["Hilboldt, John"](#)  
**Subject:** RE: Draft language for Lt. Governor's speech at Heritage  
**Date:** Wednesday, February 12, 2014 8:34:00 AM  
**Attachments:** [Rebecca Kleefisch \(DRS Edits\).doc](#)

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Hi John – This looks great, thank you for putting it together. I just made a few small tweaks using track changes. 2 weeks prior works for me – I know how many of these you circulate (when I lived in DC and worked for The Federalist Society, I was a frequent patron of your programs – whoever said there's no such thing as a free lunch has obviously never worked in the conservative movement!). Take care – DANIEL

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**From:** Hilboldt, John [mailto:[john.hilboldt@heritage.org](mailto:john.hilboldt@heritage.org)]  
**Sent:** Tuesday, February 11, 2014 4:48 PM  
**To:** Suhr, Daniel R - LTGOV  
**Subject:** Draft language for Lt. Governor's speech at Heritage

Daniel –

Thought I'd go ahead and send you some draft language for our March 20 program announcement while I had a chance. No rush from us. My thanks to postings on the State of Wisconsin website.

We usually issue our electronic invitations 12-14 days prior to the day of the event. Should you have reason to want something out sooner, we are certainly happy to do so.

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**John Edward Hilboldt**  
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*Cordially Invites You*

# Advancing Sound Policy Reforms: ~~The Wisconsin Example~~ Wisconsin's Success Story

*Featuring*

**The Honorable Rebecca Kleefisch**

Lieutenant Governor, State of Wisconsin

*Hosted by*

**Becky Norton Dunlop**

Vice President, External Relations, The Heritage Foundation

Over the last three years, the State of Wisconsin has witnessed a transformation. Through tough, but prudent, structural policy reforms, the State has balanced its budget without raising taxes, reduced government debt, increased job opportunities, begun a revitalization of its educational systems, and provided ~~property~~ tax relief to its citizens. Policymakers at all levels can learn much from the Wisconsin example. Join us as Lieutenant Governor Rebecca Kleefisch reflects upon these policy reform efforts and the positive effects they have had, and are continuing to have, in laying a solid foundation for Wisconsin's future.

**Rebecca Kleefisch** serves as Wisconsin's 44<sup>th</sup> Lieutenant Governor. A former small business owner and news reporter, she is widely credited for coining the phrase, "Wisconsin is Open for Business," and began playing a key role in business ~~growth-recruitment~~ and retention for Wisconsin immediately upon taking office. As Wisconsin's "Jobs Ambassador," Kleefisch spearheads the Governor's Small Business Summits, chaired the Governor's Sub Cabinet on Workforce Investment, and chairs the ~~newly-created Committee~~ Task Force on Minority Unemployment. Additionally, she serves on the Manufacturing and STEM Committees of the Aerospace States Association. A graduate of the University of Wisconsin-Madison, she and her husband, State Representative Joel Kleefisch, are the parents of two daughters, Ella and Violet.

**Thursday, March 20, 2014 at 12:00 p.m.**

**The Heritage Foundation's Lehrman Auditorium**

[RSVP online](#) | or call (202) 675-1752

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All events may be viewed live at [heritage.org](http://heritage.org)

News media inquiries, call (202) 675-1761



**214 Massachusetts Avenue, NE | Washington, DC 20002 | (202) 546-4400**

**From:** [Hilboldt, John](#)  
**To:** [Suhr, Daniel R - LTGOV](#)  
**Subject:** RE: Draft language for Lt. Governor's speech at Heritage  
**Date:** Wednesday, March 5, 2014 2:14:06 PM

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Thanks. We'll reserve a room for the interview. Public event is set for 12 noon.

---

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*Director, Lectures & Seminars*  
The Heritage Foundation  
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Washington, DC 20002  
202-608-6075  
[heritage.org](http://heritage.org)

---

**From:** Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]  
**Sent:** Wednesday, March 05, 2014 3:07 PM  
**To:** Hilboldt, John  
**Subject:** RE: Draft language for Lt. Governor's speech at Heritage

Indeed we are, John – very much looking forward to it in fact!

As a P.S., would it be possible to get a conference room or green room for the Lt. Gov. from 11-12 (the speech is at noon, right?). We've got an interview with Ben Domenech from The Federalist and need a quiet place for 30 minutes if that's okay. . . .

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**From:** Hilboldt, John [<mailto:john.hilboldt@heritage.org>]  
**Sent:** Wednesday, March 05, 2014 12:42 PM  
**To:** Suhr, Daniel R - LTGOV  
**Subject:** RE: Draft language for Lt. Governor's speech at Heritage

We are ready to announce the Lt. Governor's speech. Still on track?

---

**John Edward Hilboldt**  
*Director, Lectures & Seminars*  
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Washington, DC 20002  
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---

**From:** Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]  
**Sent:** Wednesday, February 12, 2014 10:00 AM  
**To:** Hilboldt, John  
**Subject:** RE: Draft language for Lt. Governor's speech at Heritage

Sounds like a plan. Much appreciated, John.

---

**From:** Hilboldt, John [<mailto:john.hilboldt@heritage.org>]  
**Sent:** Wednesday, February 12, 2014 9:00 AM  
**To:** Suhr, Daniel R - LTGOV  
**Subject:** RE: Draft language for Lt. Governor's speech at Heritage

Excellent. Thank you for the prompt response. I'll confirm that everyone's schedule is still in sync before we issue our first mailings.

---

**John Edward Hilboldt**

*Director, Lectures & Seminars*

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202-608-6075

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---

**From:** Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]

**Sent:** Wednesday, February 12, 2014 9:35 AM

**To:** Hilboldt, John

**Subject:** RE: Draft language for Lt. Governor's speech at Heritage

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**From:** [Daniel Suhr](#)  
**To:** [James Sherk](#)  
**Subject:** Re: James Sherk introduction  
**Date:** Thursday, March 6, 2014 5:36:09 PM

---

Awesome, James, that's great. We'll plan on meeting with you from 2-230 after our lunch with Becky Norton Dunlop. Our primary interest is obviously in state workforce innovations.

On Thu, Mar 6, 2014 at 4:36 PM, James Sherk <[james.sherk@gmail.com](mailto:james.sherk@gmail.com)> wrote:  
Daniel,

I would be happy to meet with her. I will be hosting our Senate labor action team from 12:30-1:30, but I would be free for the 2pm time slot.

James

On Wed, Mar 5, 2014 at 10:03 PM, Daniel Suhr <[REDACTED]> wrote:  
Hi James -- I'm writing to see if I might again call on your good offices. My boss, Lt. Governor Rebecca Kleefisch of Wisconsin, will be at Heritage in a few weeks to deliver a lecture on "The Wisconsin Success Story." While she's in the building, I'm wondering if she and I could sit down with you for a little while to talk about efforts underway in different states to promote workforce development and full employment. Would you be free from 1130-1155am or 2-230pm on Thursday, March 20? Thanks -- DANIEL

On Thu, Feb 6, 2014 at 5:05 PM, James Sherk <[james.sherk@gmail.com](mailto:james.sherk@gmail.com)> wrote:  
Daniel,

Can you send me your phone number? I have to drive to Richmond tonight, and it would be convenient to call you on the way there.

James

On Thu, Feb 6, 2014 at 2:45 PM, Brittany Corona <[brittany.l.corona@gmail.com](mailto:brittany.l.corona@gmail.com)> wrote:

Hi Daniel,

Allow me to introduce you to James Sherk, Heritage's Senior Policy Analyst in Labor Economics, or "minimum wage guru." :) He will be able to assist you and your friend.

James: Daniel is formerly Deputy Legal Counsel for Scott Walker and now serves as Chief of Staff for Lt. Governor Rebecca Kleefisch. He is also a friend of Ryan's and mine.

Best,  
Brittany

--

Brittany L. Corona  
Domestic Policy Research Assistant,  
The Heritage Foundation  
Brittany.Corona@Heritage.org  
[\(520\) 981 9636](tel:5209819636)

--

The grass withers, and the flowers fall, but the Word of the Lord stands forever.

--

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**From:** [Suhr, Daniel R - LTGOV](#)  
**To:** [Springer, Jessica](#)  
**Subject:** RE: Lt. Gov. Kleefisch Visit to Heritage  
**Date:** Thursday, March 13, 2014 11:40:00 AM

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Hi Jessica,

A few names come to mind . . . I think Jennifer Marshall is awesome and would be a great connection. Ryan Nichols from Coalition Relations is a Wisconsin guy. Ryan T. Anderson, David Azerrad, and Brittany Corona are friends of mine if they're free. We're actually meeting from 2-230pm with James Sherk to talk about workforce issues, so we're good there. Beyond that, if there are folks with a Wisconsin connection, they're welcome. And if there's anyone who tracks state tax reform issues, that's of particular interest at the moment.

Thanks,  
DANIEL

---

**From:** Springer, Jessica [mailto:Jessica.Springer@heritage.org]  
**Sent:** Thursday, March 13, 2014 9:49 AM  
**To:** Suhr, Daniel R - LTGOV  
**Subject:** RE: Lt. Gov. Kleefisch Visit to Heritage

Good morning!

One more quick question. Unfortunately Steve Moore will be in Memphis, TN next week and unable to attend the luncheon. Are there any other policy areas the Lt. Governor is interested in or Heritage people she would be interested in having attend the lunch? We have a few more spots open and wanted to make sure to include those whom would be of interest to the Lt. Governor.

Thank you,

Jessica

---

**Jessica Springer**  
*Executive Assistant to the Vice President*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6043  
[heritage.org](http://heritage.org)

---

**From:** Suhr, Daniel R - LTGOV [mailto:[Daniel.Suhr@wisconsin.gov](mailto:Daniel.Suhr@wisconsin.gov)]  
**Sent:** Wednesday, March 12, 2014 10:33 AM  
**To:** Springer, Jessica  
**Subject:** RE: Lt. Gov. Kleefisch Visit to Heritage

Hi Jessica,

Thanks for the email. I think there will be four of us - the Lt. Governor, myself, and two

security officers (although they'll probably just grab food and disappear into a nearby hallway). We're pretty simple eaters – the Lt. Governor usually tends towards salads and I'm sure the three guys would all tend towards sandwiches, but we'll do whatever. We place ourselves in your hands.

Thanks,  
DANIEL

---

**From:** Springer, Jessica [<mailto:Jessica.Springer@heritage.org>]  
**Sent:** Wednesday, March 12, 2014 9:22 AM  
**To:** Suhr, Daniel R - LTGOV  
**Subject:** RE: Lt. Gov. Kleefisch Visit to Heritage

Daniel,

I am making the final plans for the luncheon after the Lt. Governor's speech next week and wondered how many would be attending the lunch with the Lt. Governor? Are there any food allergies or requests?

Let me know if you need anything else as we plan for the event next week.

Thanks!

Jessica

---

**Jessica Springer**  
*Executive Assistant to the Vice President*  
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Thanks – DANIEL

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Lt. Governor Rebecca Kleefisch  
608.266.3516 (office)



**From:** [Suhr, Daniel R - LTGOV](#)  
**To:** [Springer, Jessica](#)  
**Subject:** RE: John Fund - at lunch  
**Date:** Monday, March 17, 2014 7:29:10 PM

---

Thanks Jessica, appreciate it. I think John Himboldt has arranged a room for us from 11-12 for a pair of 30-minute media interviews before the speech. Then after lunch we're sitting with James Sherk in his office for a half hour. See you Thursday -- DANIEL

---

From: Springer, Jessica [Jessica.Springer@heritage.org]  
Sent: Monday, March 17, 2014 4:31 PM  
To: Suhr, Daniel R - LTGOV  
Subject: John Fund - at lunch

I talked to Becky and the lunch is unfortunately full. But she said if we need to arrange a room before the lecture or right after for an interview we can do that.

Just let me know,

Thanks!

---

Jessica Springer  
Executive Assistant to the Vice President  
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**From:** [Suhr, Daniel R - LTGOV](#)  
**To:** [Riemann, Wendy - GOV](#)  
**Subject:** RE: Heritage  
**Date:** Thursday, March 20, 2014 5:45:28 AM

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It will be pretty promptly a few minutes after noon. So come by whenever.

---

From: Riemann, Wendy - GOV  
Sent: Wednesday, March 19, 2014 3:30 PM  
To: Suhr, Daniel R - LTGOV  
Subject: RE: Heritage

Hey Daniel,

What time does she actually start speaking tomorrow? I have another event at noon I need to stop at – just trying to figure out which to do first.

Wendy

---

Wendy Riemann  
Director of Federal Relations  
Office of Wisconsin Governor Scott Walker  
[wendy.riemann@wisconsin.gov](mailto:wendy.riemann@wisconsin.gov)<<mailto:wendy.riemann@wisconsin.gov>>  
direct line: (202) 624-5999  
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Suite 613  
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From: Suhr, Daniel R - LTGOV  
Sent: Thursday, March 06, 2014 6:50 PM  
To: Riemann, Wendy - GOV  
Subject: Heritage

Hi Wendy – If you can join us this day for the speech, we'd love to see you there! Please feel free as well to pass along to other Wisconsin enthusiasts in DC. Thanks – DANIEL

[cid:image001.gif@01CF4390.9C76B290]  
INVITATION

Advancing Sound Policy Reforms:

Wisconsin's Success Story

Featuring  
The Honorable Rebecca Kleefisch  
Lieutenant Governor, State of Wisconsin

Hosted by  
Becky Norton Dunlop  
Vice President, External Relations, The Heritage Foundation

Over the last three years, the State of Wisconsin has witnessed a transformation. Through tough, but prudent, structural policy reforms, the State has balanced its budget without raising taxes, reduced government debt, increased job opportunities, begun a revitalization of its educational systems, and provided tax relief to its citizens. Policymakers at all levels can learn much from the Wisconsin example. Join us as Lieutenant Governor Rebecca Kleefisch reflects upon these policy reform efforts and the positive effects they have had, and are continuing to have, in laying a solid foundation for Wisconsin's future.

Rebecca Kleefisch serves as Wisconsin's 44th Lieutenant Governor. A former small business owner and news reporter, she is widely credited for coining the phrase, "Wisconsin is Open for Business," and began playing a key role in business recruitment and retention for Wisconsin immediately upon taking office. As Wisconsin's "Jobs Ambassador," Kleefisch spearheads the Governor's Small Business Summits, chaired the Governor's Sub Cabinet on Workforce Investment, and chairs the Task Force on Minority Unemployment. Additionally, she serves on the Manufacturing and STEM Committees of the Aerospace States Association. A graduate of the University of Wisconsin-Madison, she and her husband, State Representative Joel Kleefisch, are the parents of two daughters, Ella and Violet.

Thursday, March 20, 2014 at 12:00 p.m.

The Heritage Foundation's Lehrman Auditorium

RSVP online<<http://links.heritage.org/ct/18174179:19287342741:m:1:521502954:53C5AC916AF3589AD3A2677C81759A9E:r>> | or call (202) 675-1752<tel:%28202%29%20675-1752>

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heritage.org<<http://links.heritage.org/ct/18174181:19287342741:m:1:521502954:53C5AC916AF3589AD3A2677C81759A9E:r>>

News media inquiries, call (202) 675-1761

214 Massachusetts Avenue, NE | Washington, DC 20002 | (202) 546-4400<tel:%28202%29%20546-4400>

Daniel R. Suhr, Chief of Staff  
Lt. Governor Rebecca Kleefisch  
608 266.3516 (office)

**From:** [Burton, David](#)  
**To:** [Suhr, Daniel R - LTGOV](#)  
**Subject:** From David Burton, Heritage Foundation  
**Date:** Friday, March 21, 2014 10:51:31 AM  
**Attachments:** [CFO Survey.pdf](#)

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It was good meeting you. Let me know if I can help you in any way, especially on tax policy, securities regulation or entrepreneurship/small business issues.

I have attached I report that I saw this morning that may be of interest to you about what CFOs consider most important when evaluating states for plant location.

Cordially,

David

David R. Burton  
*Senior Fellow in Economic Policy*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6229 (direct dial)  
[David.Burton@heritage.org](mailto:David.Burton@heritage.org)

*The Heritage Foundation is committed to building an America where freedom, opportunity, prosperity and civil society flourish.*

---

**David Burton**  
*Senior Fellow, Economic Policy*  
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## FULL FINDINGS

[ Providing keen insights from 101 U.S. Chief Financial Officers of insourcing companies, firms that operate in the United States and are headquartered overseas. ]

March 2014

## Summary

The Organization for International Investment (OFII) and PricewaterhouseCoopers, LLP (PwC) are proud to present the 2014 Insourcing Survey. This survey provides keen insights from 101 U.S. Chief Financial Officers (CFOs) of insourcing companies, firms that are headquartered overseas and operate in the United States.

The ability to attract foreign investment is a key component of U.S. economic growth. According to the U.S. Bureau of Economic Analysis, annual inflows of foreign direct investment have averaged \$179 billion per year since 2000. By 2012 the total stock of foreign direct investment in the United States reached \$2.65 trillion, about a third of which (\$899 billion) is in the manufacturing sector.<sup>1</sup> U.S. subsidiaries of foreign companies employ 5.6 million workers with \$438 billion of payroll, employ 17 percent of America's manufacturing workers, produce over 20 percent of U.S. exports, conduct 16 percent of U.S. private sector R&D and pay 15 percent of U.S. federal corporate income taxes.<sup>2</sup>

Overall, CFOs expressed confidence in the U.S. economy. Despite the slow economic recovery, CFOs ranked the U.S. business investment climate more favorable than in the prior two surveys. Many U.S. subsidiaries are beginning to shift to a growth mode: 51 percent of survey respondents plan to increase U.S. employment in 2014 and 64 percent plan to increase U.S. investment.

Despite rising confidence in the U.S. economy, challenges remain. While the United States compares favorably to other advanced economies in terms of access to capital and proximity to customers, CFOs say the U.S. lags in terms of its corporate income tax system. Reform of U.S. taxation and regulation is viewed by CFOs as the most important areas for improvement to increase foreign investment in the United States.



Nancy McLernon,  
President & CEO, OFII



Joel Walters,  
U.S. Inbound Tax Services Leader, PwC

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<sup>1</sup> <http://www.bea.gov/international/di1fdibal.htm>

<sup>2</sup> All data is from the Bureau of economic analysis for 2011, except federal corporate income tax data which is from the IRS and is for 2010.

## KEY TAKEAWAYS

### Insourcing CFOs Have Growing Confidence in the U.S. Economy

CFO confidence in investing in the U.S. economy is up 20 percent from 2011.

### Increased Confidence Means More Investment and Employment

Nearly two-thirds of CFOs anticipate increased investment in the United States within the next 12 months, and more than half expect to increase employment over that same period.

### U.S. Manufacturing and Exports on the Rise

More than 70 percent of insourcing manufacturers expect to increase output over the next five years. Similarly, 60 percent of insourcing companies that export from the United States expect to increase exports over the next five years.

### Emerging Markets Viewed as Top Location for New Investment

Nearly three-quarters of CFOs identify a BRIC country as their "top location for growth and new investment" over the next five years. Only 13 percent list the United States.

### Among Advanced Economies, America Offers a Better Business Environment

The percentage of insourcing CFOs who say America offers a better business environment compared to other advanced countries has increased dramatically, climbing 35 percentage points since 2011 (from 23% to 58%).

### Corporate Tax Rate Is the Top Tax Policy Impacting CFO Investment Decisions

Among tax policies, 54 percent of CFOs say the corporate tax rate is the most impactful factor affecting their business.

### Ensuring Fair Treatment of Insourcing Companies Is Critical

Four in 10 insourcing companies say unfair tax treatment has negatively impacted their U.S. business operations and more than a quarter have faced discrimination in bidding on government contracts.

### Ways America can Attract More Global Investment:

Insourcing CFOs rank: 1) the "Tax System," 2) "Regulatory System," and 3) "Skilled Workforce," as the most important issue areas where the United States can improve in order to increase global investment.

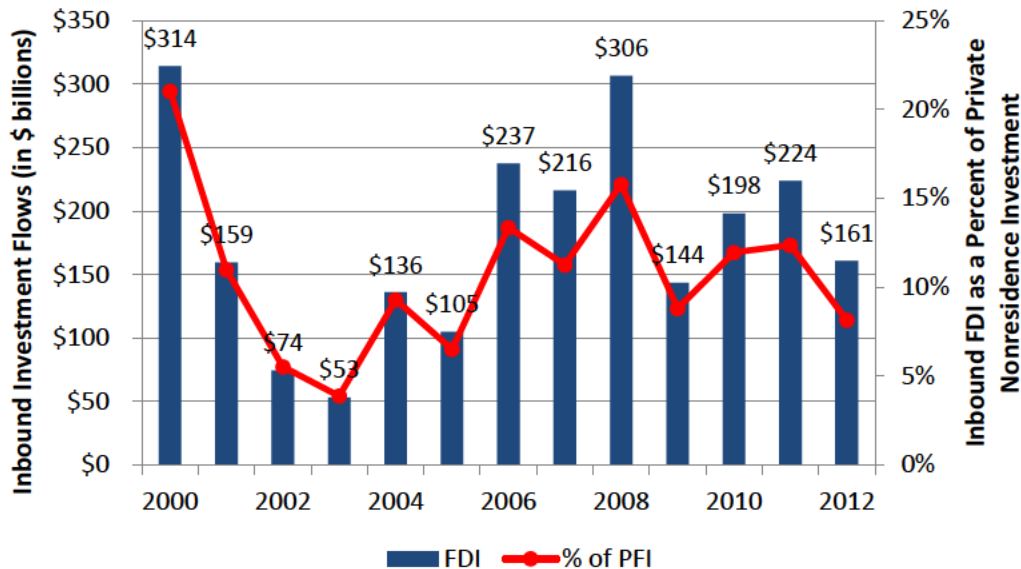
### What States can Do:

- ✓ Beyond economic and tax incentives, CFOs says "**state corporate tax policy aligning with international norms (i.e. federal tax treaties)**" is an important consideration when evaluating states as locations for new investment.
- ✓ Once a company has located in a state, **connecting businesses with new local customers** is the most important service a state can offer to ensure insourcing companies grow and expand employment in the state.
- ✓ More than half of CFOs identified **educational priorities** as the most important service a state can provide to encourage greater investment and growth.

## HISTORICAL TRENDS

Insourcing companies are an important source of U.S. investment. According to the U.S. Bureau of Economic Analysis, annual inflows of foreign direct investment have averaged \$179 billion per year since 2000, averaging 11 percent of private nonresidential fixed investment (see **Figure 1**).

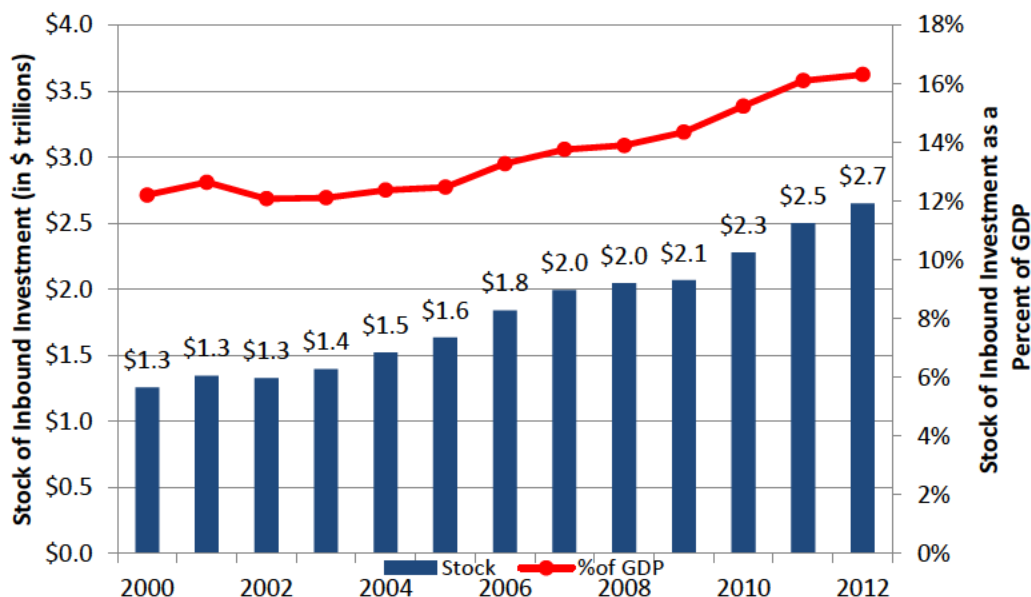
**Figure 1 – Annual Inflow of Foreign Direct Investment in U.S., 2000-2012**



Source: U.S. Bureau of Economic Analysis and PwC calculations.

The total stock of foreign direct investment in the U.S. grew to \$2.65 trillion in 2012, or more than 16 percent of U.S. GDP (see **Figure 2**). According to the BEA, about one third of the U.S. stock of inbound investment (\$899 billion) is in the manufacturing sector.

**Figure 2 – Stock of Inbound Foreign Direct Investment in U.S., 2000-2012**

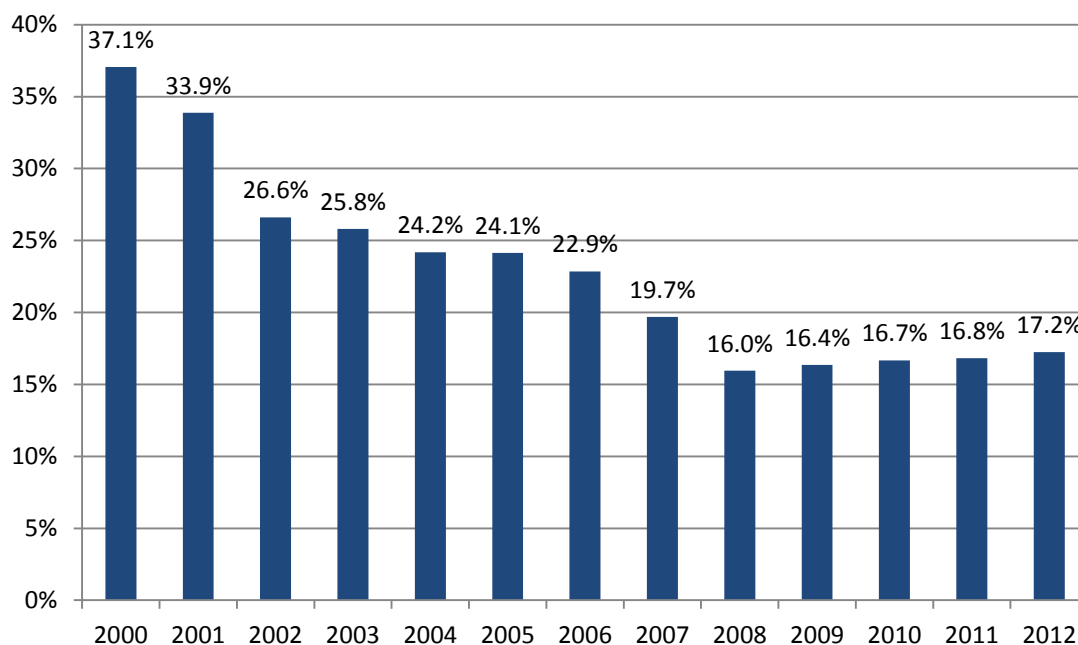


Source: U.S. Bureau of Economic Analysis and PwC calculations.



While the United States is the largest recipient of foreign direct investment, its share of global investment has declined from 37 percent in 2000 to 17 percent in 2012 (see **Figure 3**).

**Figure 3 – U.S. Share of Global Inbound Investment Stock, 2000-2012**



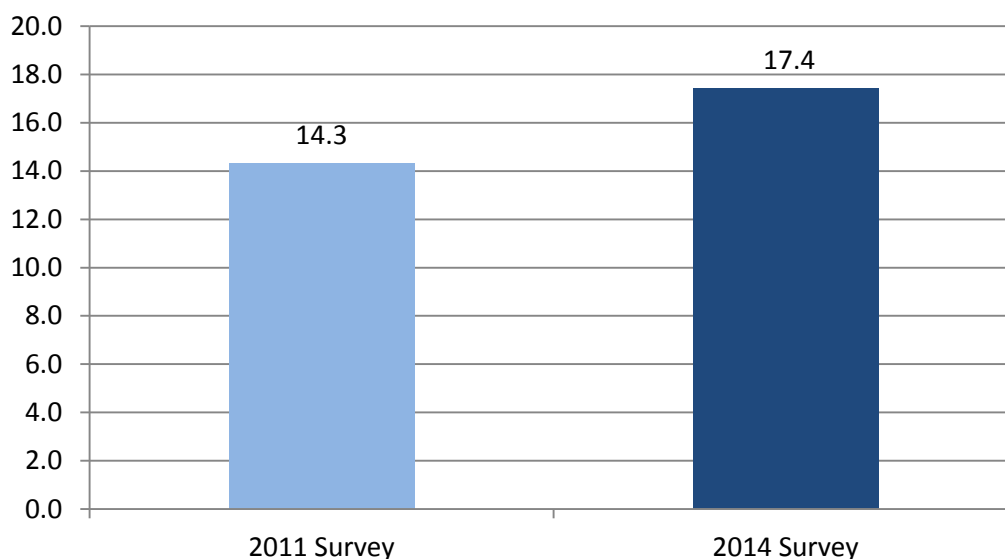
Source: UNCTADStat database (downloaded on February 11, 2014).

## INSOURCING CFOS HAVE GROWING CONFIDENCE IN U.S. ECONOMY

Despite the slow recovery from the 2008-2009 recession, CFO confidence in the U.S. economy is improving. When asked to rank their confidence on a scale of 1 to 25, respondents to the 2014 CFO Survey gave the U.S. economy an average score of 17.4, a more than 20 percent jump from the 2011 survey (see **Figure 4**).

**Figure 4 – CFOs' Confidence in the U.S. Economy is on the Rise**

As a global executive, how would you rate your overall confidence in investing in the U.S. economy?  
(1= Poor/Weak, 25=Excellent)



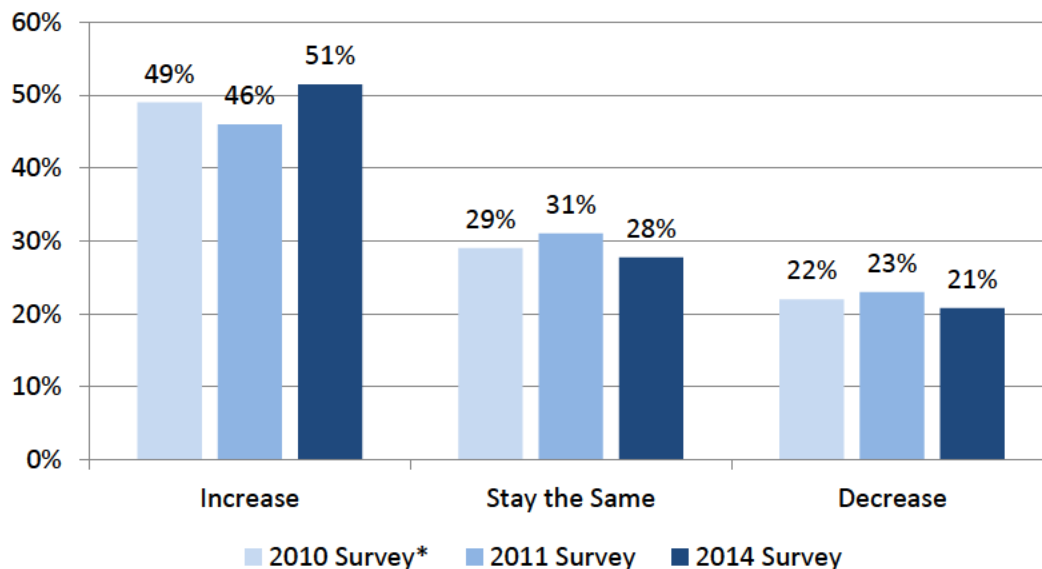
Number of respondents: 100 for 2011 survey and 101 for 2014 survey.

## Increased Confidence Means More Investment and Employment

The significance of that growing confidence is best viewed in terms of what it means for U.S. workers. More than half (51 percent) of CFOs plan to increase employment in the United States in the next twelve months, compared to 46 percent in the 2011 survey (see **Figure 5**).

**Figure 5– Increased Confidence in the U.S. Leads to Increased Employment**

How will the level of your company's employment in the United States change over the next twelve months?



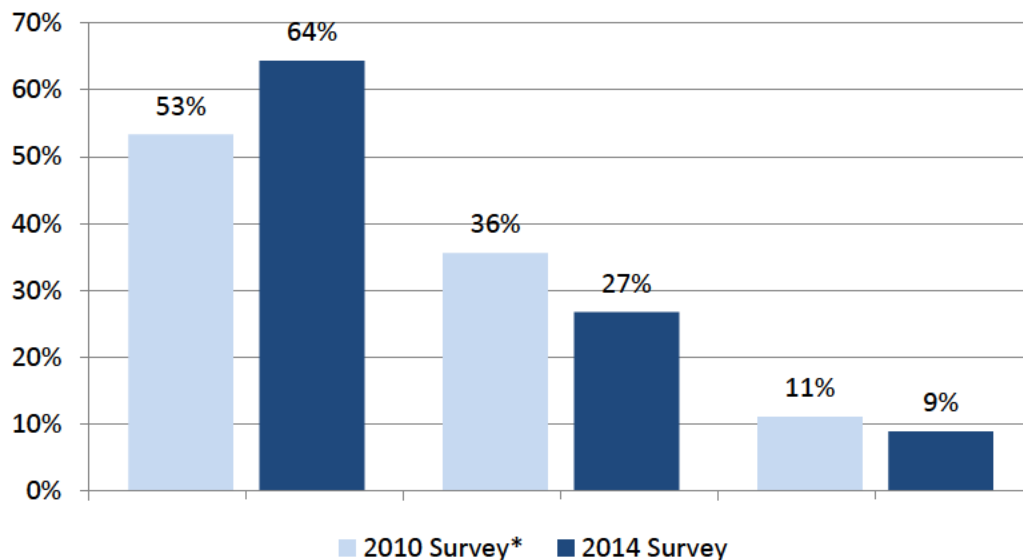
Number of respondents: 90 for 2010 survey, 100 for 2011 survey, and 101 for 2014 survey.

\*In 2010, respondents were asked about their plans over the next 12 to 18 months.

Almost two-thirds (64 percent) of CFOs plan to increase U.S. investment over the next 12 months. By comparison, in the 2010 survey, 53 percent of CFOs planned to increase U.S. investment in the following 12 months (see **Figure 6**).

**Figure 6– Almost Two Thirds of CFOs Anticipate Increased U.S. Investment in 2014**

How will the level of your company's investment in the United States change over the next twelve months?



Number of respondents: 90 for 2010 survey and 101 for 2014 survey.

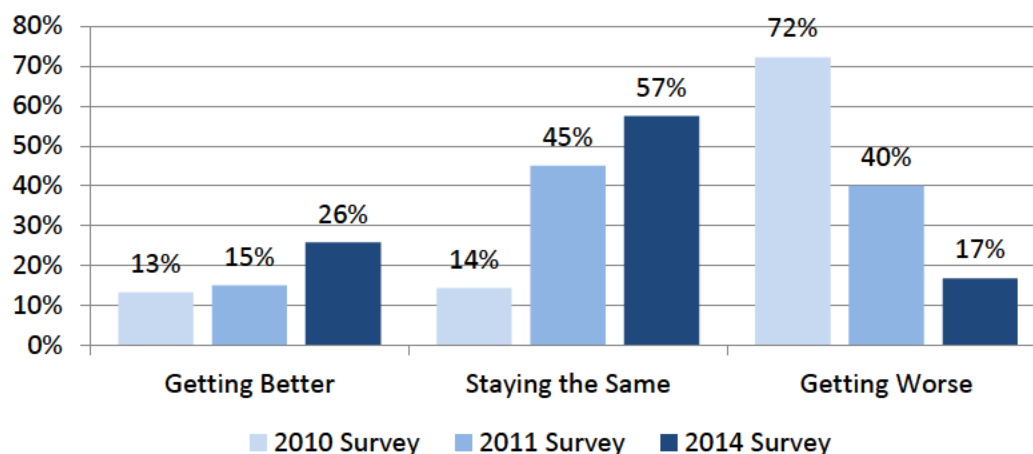
\*In 2010, respondents were asked about their plans over the next 12 to 18 months.

## U.S. Business Climate Improving

The share of CFOs who view the U.S. business climate as improving has more than doubled since the 2010 survey, from 13 percent to 26 percent. More importantly, the share of CFOs who view the U.S. business climate as getting worse has plummeted 55 percentage points since 2010, from 72 percent to 17 percent (see **Figure 7**). In fact, more than 80 percent of insourcing CFOs think the business climate today is as good or getting better than last year.

**Figure 7– CFO’s Views on the U.S. Business Climate Have Greatly Improved since 2010**

How would you say that today’s U.S. business climate is for foreign companies?

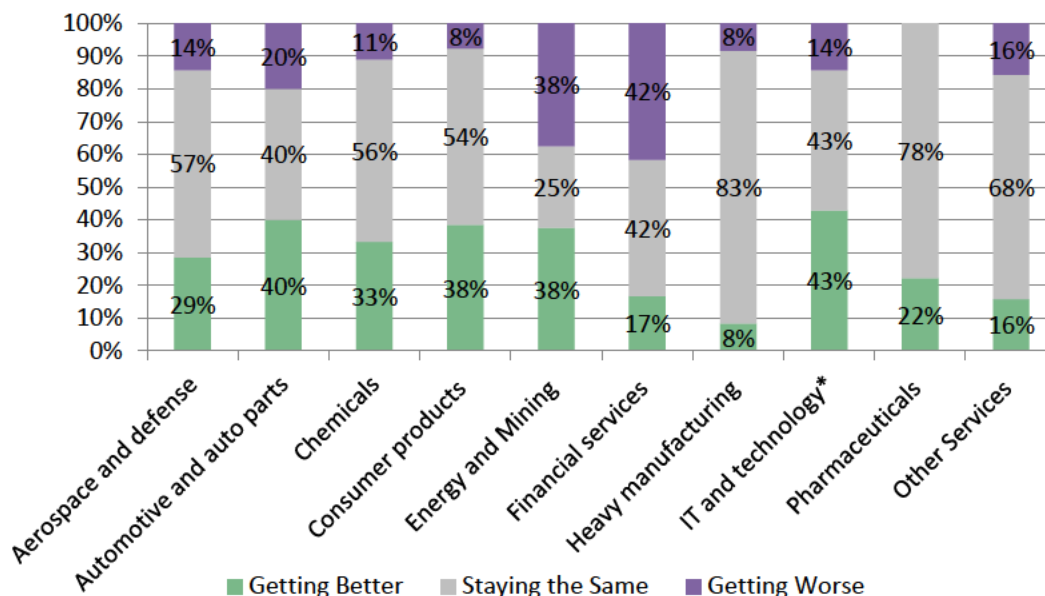


Number of respondents: 90 for 2010 survey, 100 for 2011 survey, and 101 for 2014 survey.

Views on business climate vary across different industries. The percentage of CFOs who view the U.S. business climate as improving is highest in the IT and technology, consumer products, and chemicals sectors. By contrast, the percentage of CFOs who view the U.S. business climate as getting worse is highest in the energy and financial services sectors. In fact, more than 40 percent of CFOs in the finance services sector view the U.S. business climate as worsening (see **Figure 8**).

**Figure 8– Business Climate for Foreign Companies, By Industry**

How would you say that today’s U.S. business climate is for foreign companies?



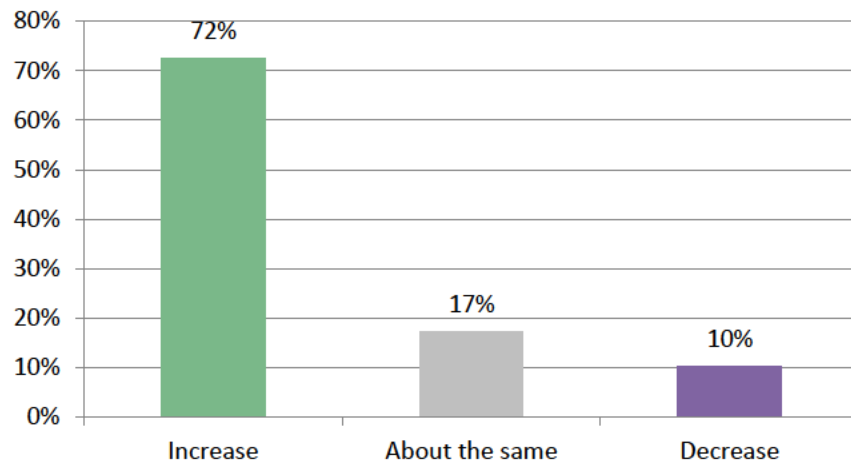
Number of respondents: 101: Aerospace and defense (7), Automotive and auto parts (5), Chemicals (9), Consumer products (13), Energy and mining (8), Financial services (12), Heavy manufacturing (12), IT and technology (7), Pharmaceuticals (9), and Other services (19). \*Includes telecommunications.

## U.S. Manufacturing and Exports on the Rise

The President, with strong bipartisan support, has sought to expand the U.S. manufacturing sector. U.S. subsidiaries account for over one in six jobs in the manufacturing sector. Over two-thirds (69 percent) of survey respondents engage in U.S. manufacturing. Of these companies, 72 percent plan to increase manufacturing output in the U.S. over the next five years (see **Figure 9**).

**Figure 9– Most Respondents in Manufacturing Industries Expect Output to Increase**

If your company manufactures, do you expect your U.S. manufacturing output to increase or decrease over the next five years?

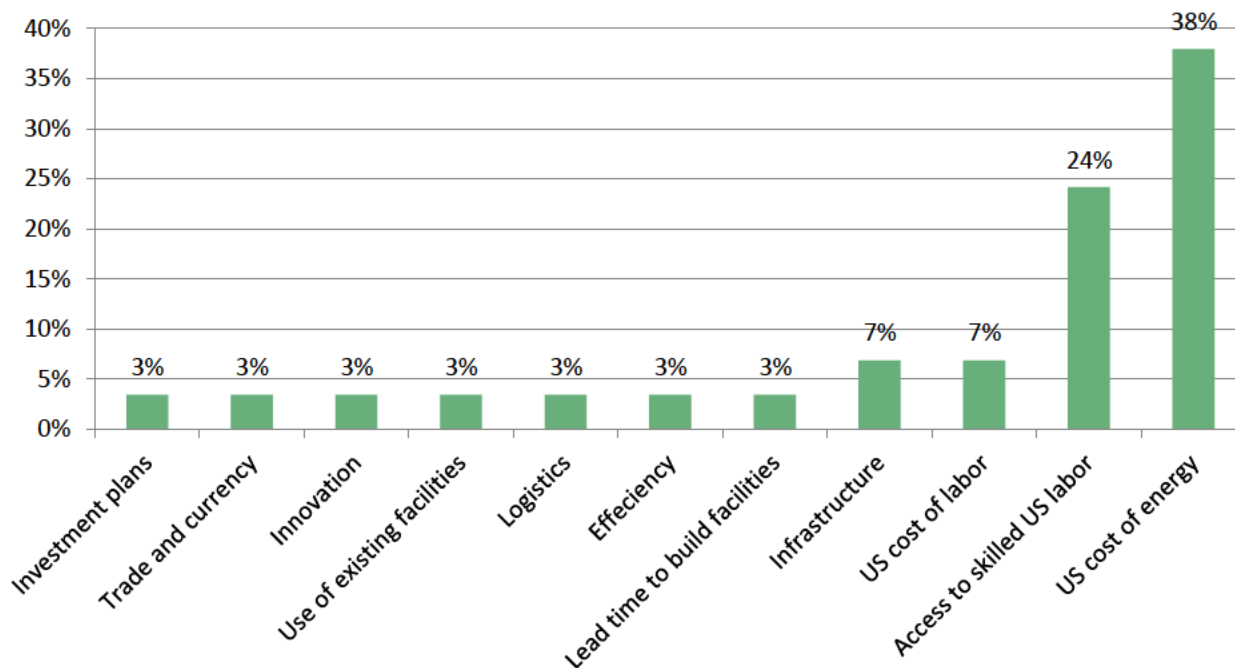


Number of respondents: 69 companies manufacturing in the U.S.

Growing demand from U.S. customers is driving these expected increases, but to better understand what supply factors influence these decisions, CFOs were asked to rank a number of areas that might affect manufacturing output. The top factor they identified was America's low cost energy, followed by access to skilled labor, infrastructure, and affordable labor (see **Figure 10**).

**Figure 10– For Manufacturers Planning to Increase Output, Cost of Energy is the Most Important Supply Consideration**

Which of the following supply factors is the primary reason you expect your U.S. manufacturing output to increase or decrease over the next five years?

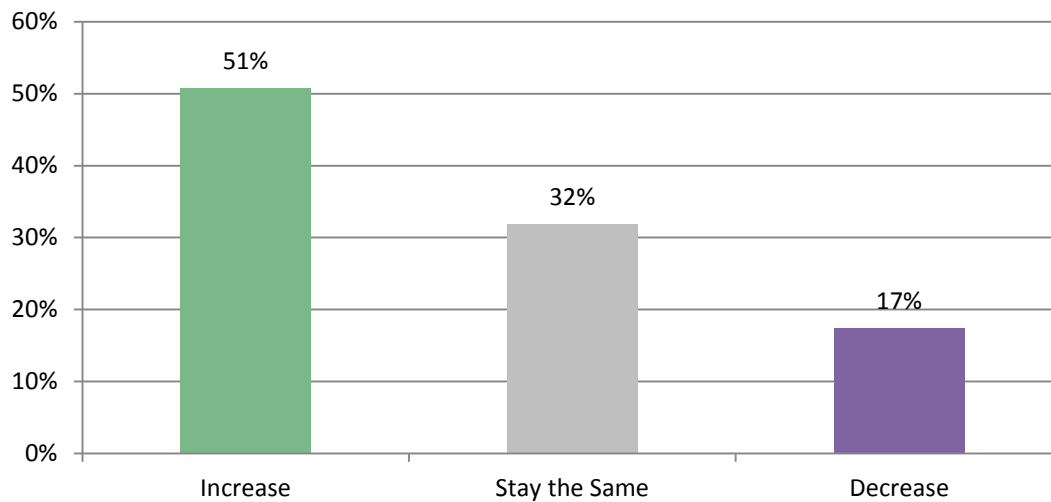


Number of respondents: 29 manufacturers that plan to increase output.

Within the manufacturing sector, about half of CFOs (51 percent) plan to increase U.S. employment over the next 12 months (see **Figure 11**).

**Figure 11– Majority of Respondents in Manufacturing Industries Will Increase U.S. Employment in 2014**

How will the level of your company's employment in the United States change over the next twelve months?

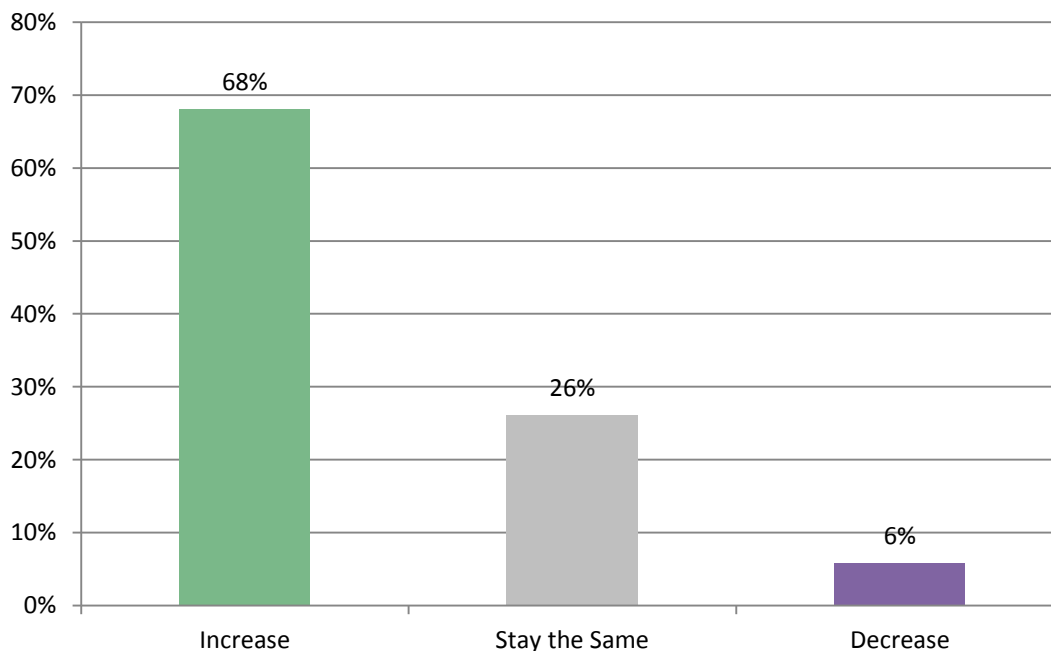


Number of respondents: 69 companies currently manufacturing in the U.S.

Within the manufacturing sector, more than two-thirds of CFOs (68 percent) plan to increase U.S. investment over the next 12 months (see **Figure 12**).

**Figure 12– Majority of Respondents in Manufacturing Industries Will Increase U.S. Investment in 2014**

How will the level of your company's investment in the United States change over the next twelve months?



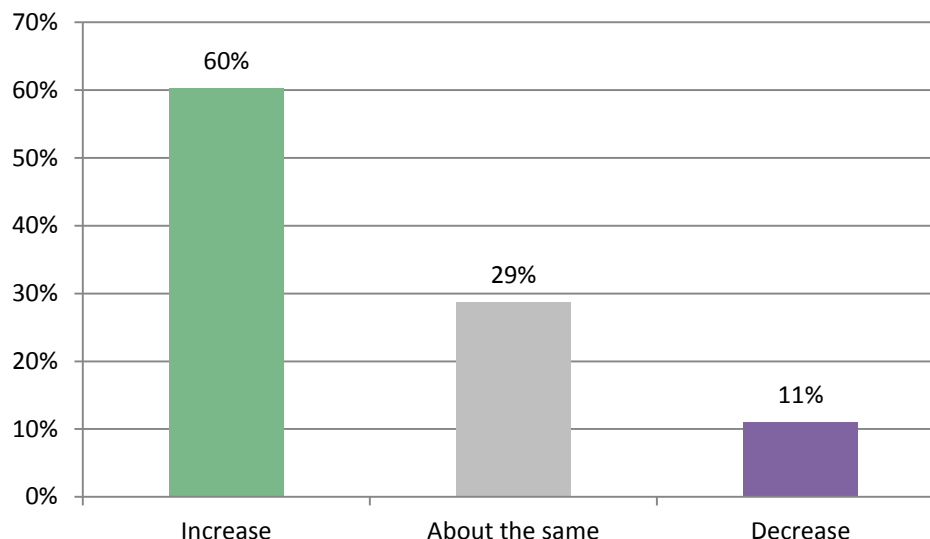
Number of respondents: 69 companies currently manufacturing in the U.S.

## Exports are Trending Up

The outlook for exports by the U.S. subsidiaries is bright. Among exporting companies, 60 percent of CFOs plan to increase exports over the next five years (see **Figure 13**).

**Figure 13– Exports by U.S. Subsidiaries are Expected to Increase**

Do you expect the level of exporting activity to increase or decrease over the next five years?

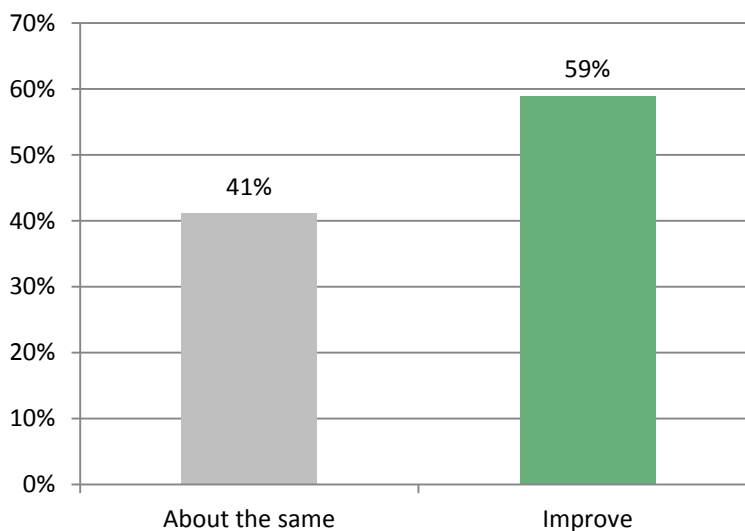


*Number of respondents: 73 respondents indicated they are currently exporters. The remaining 28 indicated they are not currently exporters and do not anticipate exporting from the U.S. during the next five years.*

Further, 60 percent of insourcing companies that export indicate that enacting comprehensive trade agreements, including the Trans-Pacific Partnership and the Transatlantic Trade and Investment Partnership will make the United States more attractive for global investment (see **Figure 14**).

**Figure 14– Majority of Exporters view Enactment of Trade Agreements as Improving the U.S. as an Investment Location**

If the U.S. were to enact comprehensive trade agreements, including the Transatlantic Trade and Investment Partnership and the Trans-Pacific Partnership, what would be the impact on your company's view of the U.S. as an investment location?



*Number of respondents: 73*

## EVALUATING U.S. COMPETITIVENESS

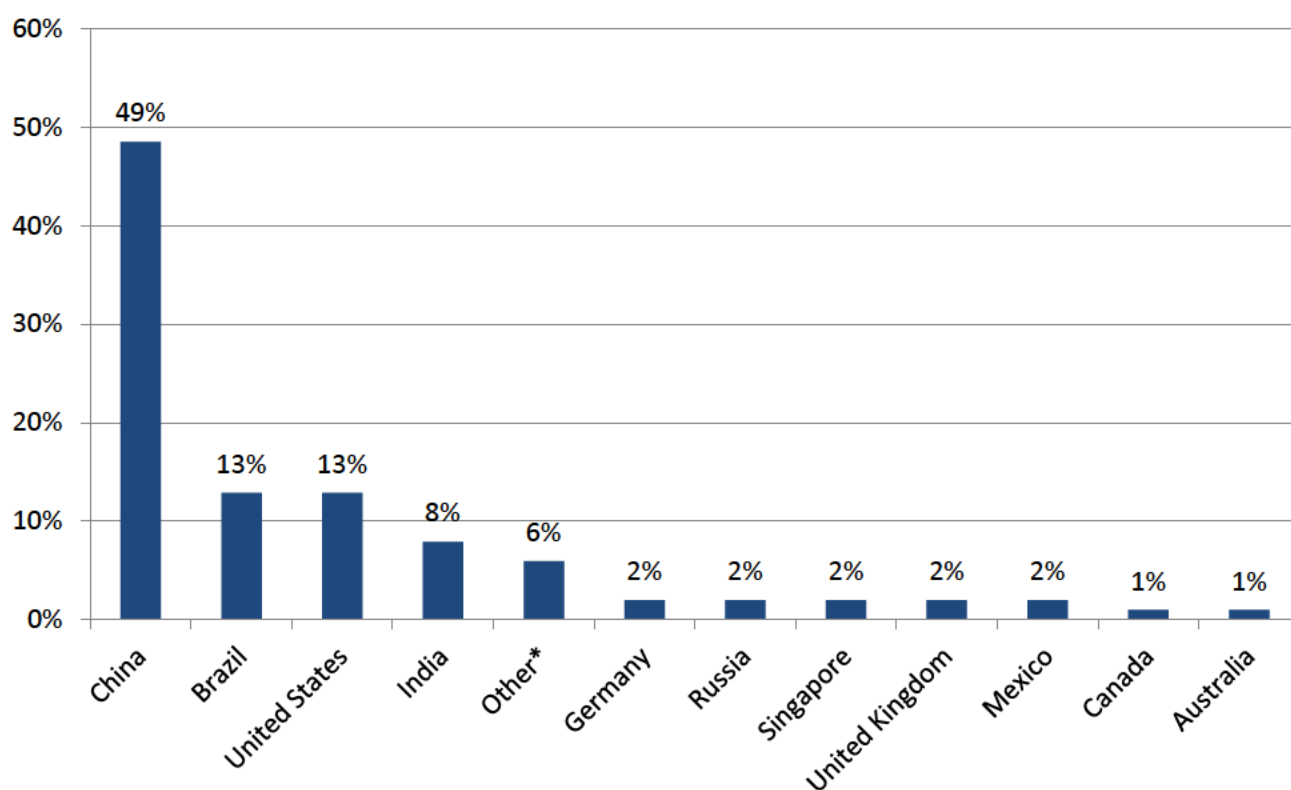
### Emerging Markets Viewed as 'Top Location' for New Investment

The U.S. share of global inbound investment has dropped by half since 2000. This decline has been accompanied by an increase in the share of global investment going to Brazil, Russia, India, and China, the so-called "BRIC" countries. In 2012, BRIC countries accounted for 19.5 percent of all inbound FDI flows, up from 5.6 percent in 2000.<sup>3</sup>

The survey suggests this trend will continue. 72 percent of CFOs identified one of the BRIC countries as the top location for new cross-border investment over the next five years (see **Figure 15**). China ranked first among investment locations (selected by 49 percent of CFOs), while the United States was tied for second with Brazil (each selected by 13 percent of CFOs).

#### Figure 15– China Is the Top Location for Growth & New Investment Worldwide

Outside of your "home" market, which country does your company view as the top location for growth or new investment worldwide over the next five years?



Number of respondents: 101.

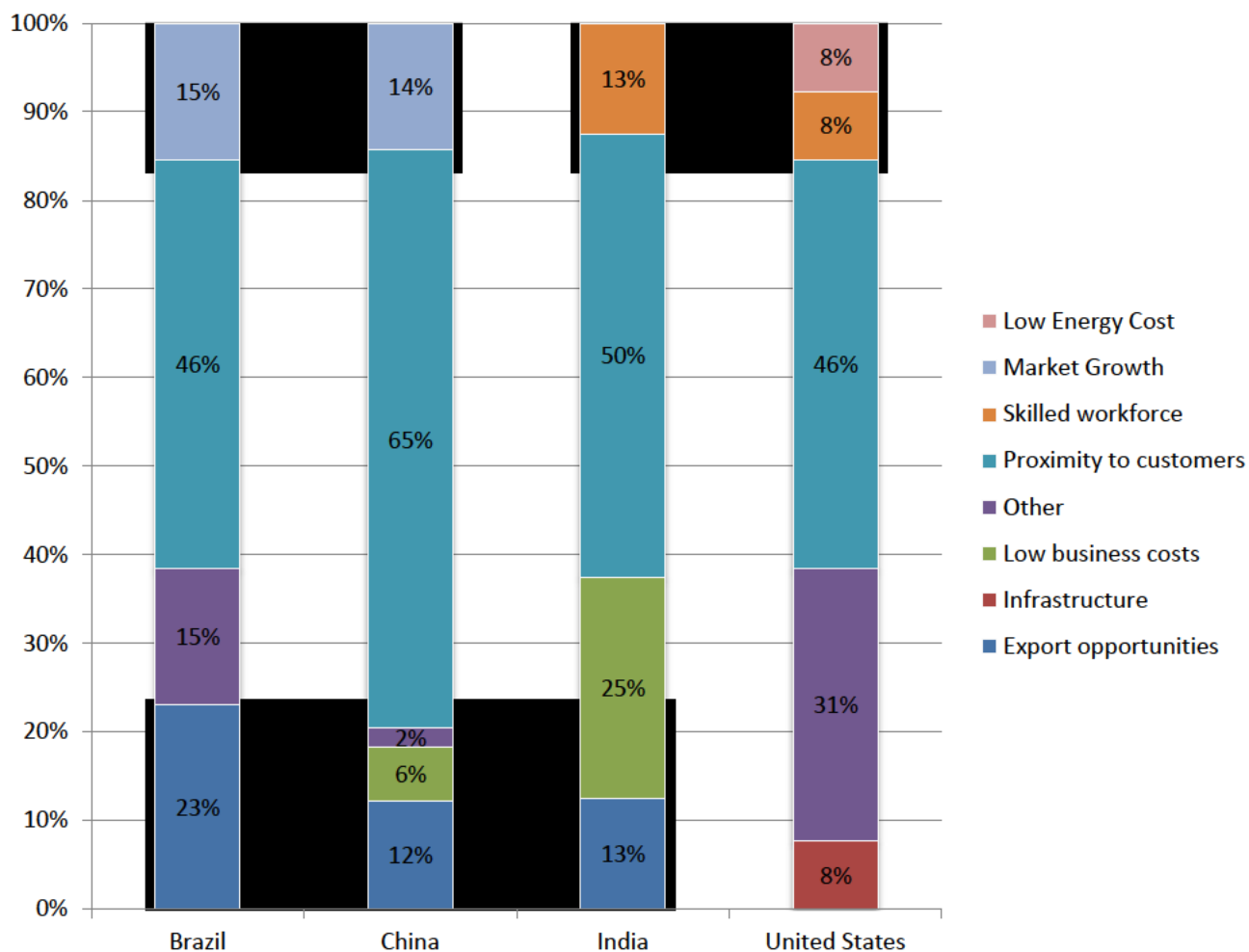
\*Other responses include: Latin America, Saudi Arabia, Sub-Saharan Africa, and the Middle East

<sup>3</sup> Data from UNCTADStat database (downloaded on 2/11/2014).

Countries attract investment for different reasons, including proximity to customers, skilled workforce, infrastructure, low costs of doing business, and export opportunities. Access to customers is the main consideration when evaluating investment options across the top four locations identified by insourcing CFOs. Additionally, export opportunities were identified as an important factor in Brazil, China, and India. Infrastructure and access to skilled labor are considerations in the United States (see **Figure 16**).

**Figure 16– Proximity to Customers Important Factor in Determining Location of Investment**

Which of the following is the primary advantage the market identified as the top market for growth or new investment offers your company?



Number of respondents: 83.

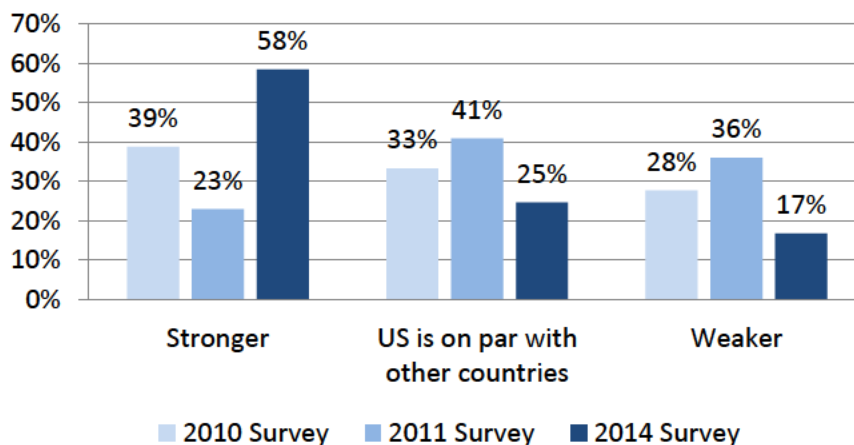


## Among Advanced Economies, America Offers a Better Business Environment for Foreign Companies

As compared to other advanced economies, 58 percent of CFOs see the United States as having a stronger business environment, up from 23 percent in 2011. Only 17 percent of CFOs see the United States as having a weaker business environment than other advanced economies, down from 36 percent in 2011 (see **Figure 17**).

**Figure 17– U.S. Business Climate Improving Among Other Advanced Economies**

How would you compare the United States to other countries with advanced economies in terms of the overall business environment for foreign companies?

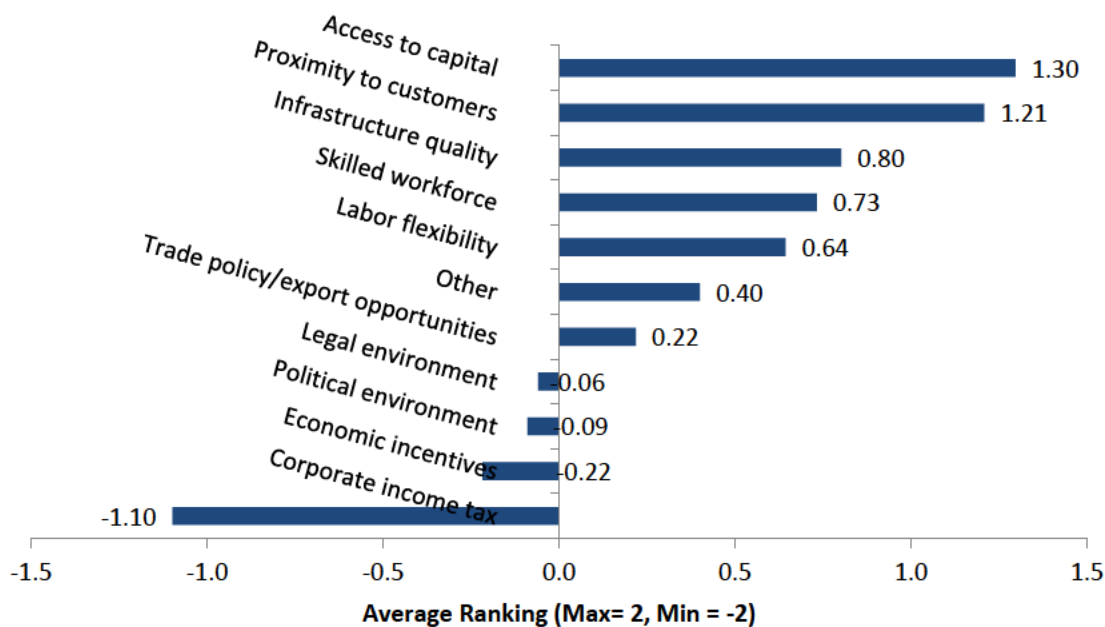


Number of respondents: 90 for 2010 survey, 100 for 2011 survey, and 101 for 2014 survey.

CFOs say the United States compares favorably with other advanced economies in terms of access to capital, proximity to customers, and the quality of its infrastructure and labor force. The U.S. corporate income tax is by far the most uncompetitive factor for the U.S. compared to other advanced economies (see **Figure 18**).

**Figure 18– Comparative Advantages and Disadvantages of the U.S. Economy**

How does the U.S. compare with other advanced economies on the following factors?



Number of respondents: 101.

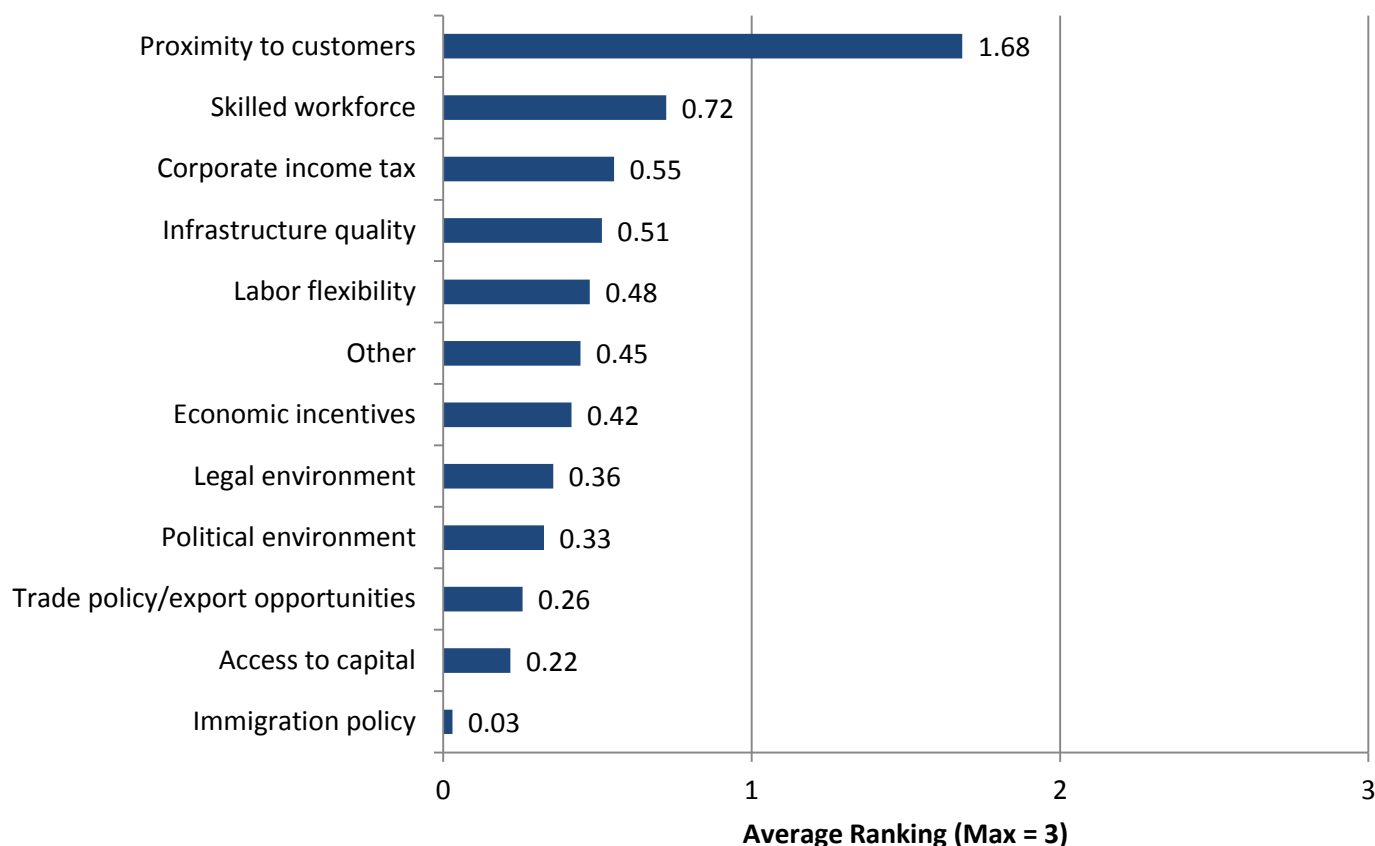
Values represent a weighted average where the highest ranking receives a score of 2 and the lowest ranking receives a score of -2. A score of zero indicates the U.S. is average compared to other advanced economies.

## TOP FACTORS DRIVING GLOBAL INVESTMENT DECISIONS

Insourcing CFOs ranked proximity to customers, skilled labor force, and corporate income tax as the three most important factors when evaluating investment options around the world (see **Figure 19**). With 95 percent of the world's consumers living outside the United States and 62 percent of CFOs identifying China and Brazil as the top locations for new investment due in large part to the proximity of customers and growth potential, it is increasingly important for the U.S. to outshine our competitors in the areas policymakers can impact, such as skilled workforce, corporate tax, and infrastructure quality (see **Figures 15** and **16**).

**Figure 19—Top Factors in Evaluating Investment Options Around the World**

When your company evaluates different investment options around the world, what are the most important factors in deciding a location for your company's major investments?



Number of respondents: 101.

Values represent a weighted average where the highest ranking receives a score of 3, the lowest ranking receives a score of 1, and no ranking receives a score of 0. Other responses include: Economic gain, Market access, Regulatory environment, Local growth prospects of industry, and Total manufacturing costs.

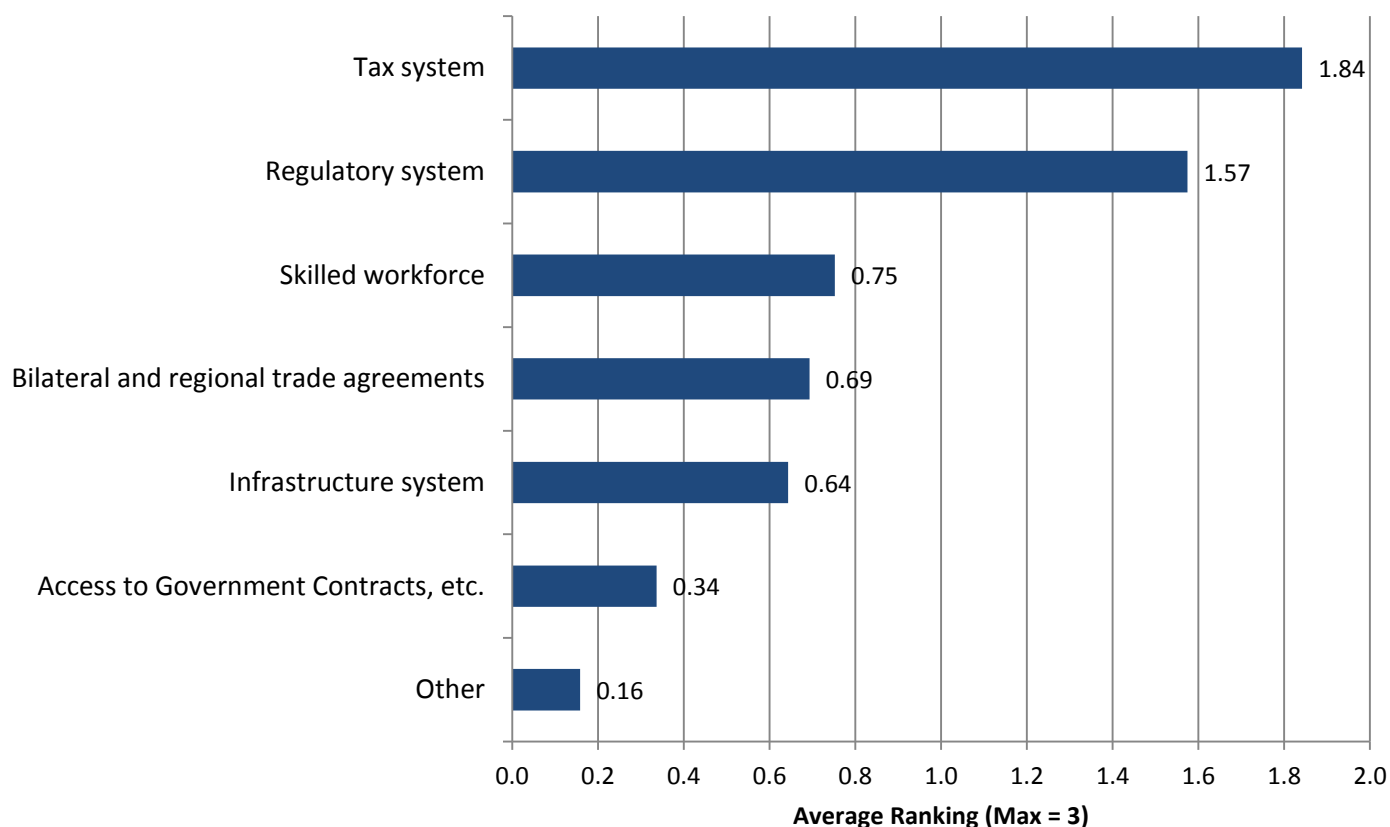
## HOW AMERICA CAN ATTRACT MORE GLOBAL INVESTMENT

### Tax and Regulatory Reform are Important

With CFOs identifying corporate income tax as the area in which the United States is least competitive relative to other advanced countries, it is no surprise that the most important area for the U.S. to improve in order to increase foreign direct investment was the U.S. tax system. Improving the regulatory system was also identified as another top priority (see **Figure 20**).

**Figure 20– Tax and Regulatory Systems Are Most in Need of Improvement**

*What are the most important issue areas the United States can improve in order for your company to increase investment in the United States?*



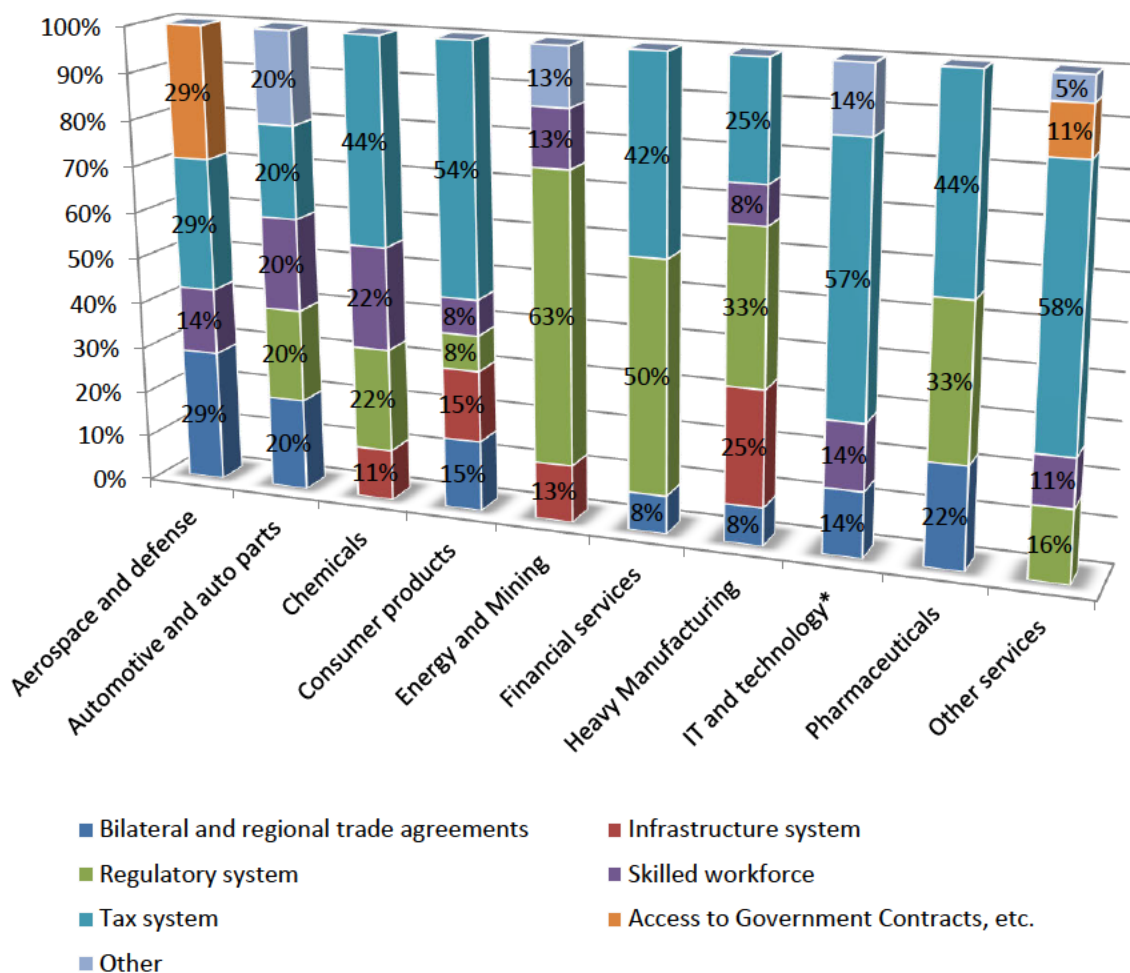
*Number of respondents: 101.*

*Values represent a weighted average where the highest ranking receives a score of 3, the lowest ranking receives a score of 1, and no ranking receives a score of 0.*

While the tax system was identified as the most important policy area to improve in order to attract greater foreign investment overall, CFOs in the energy and financial services industries say the regulatory system is the top priority. The regulatory system was also identified as important to the pharmaceutical and heavy manufacturing sectors. Heavy manufacturing identified infrastructure as an important priority. The aerospace and defense, pharmaceuticals, and automotive and auto parts sectors indicated that action on trade agreements would help attract greater investment (see **Figure 21**).

**Figure 21– Top Issues Where the U.S. Can Improve, By Industry**

What are the most important issue areas the United States can improve in order for your company to increase investment in the United States?



Number of respondents: 101: Aerospace and defense (7), Automotive and auto parts (5), Chemicals (9), Consumer products (13), Energy and mining (8), Financial services (12), Heavy manufacturing (12), IT and technology (7), Pharmaceuticals (9), and Other services (19).

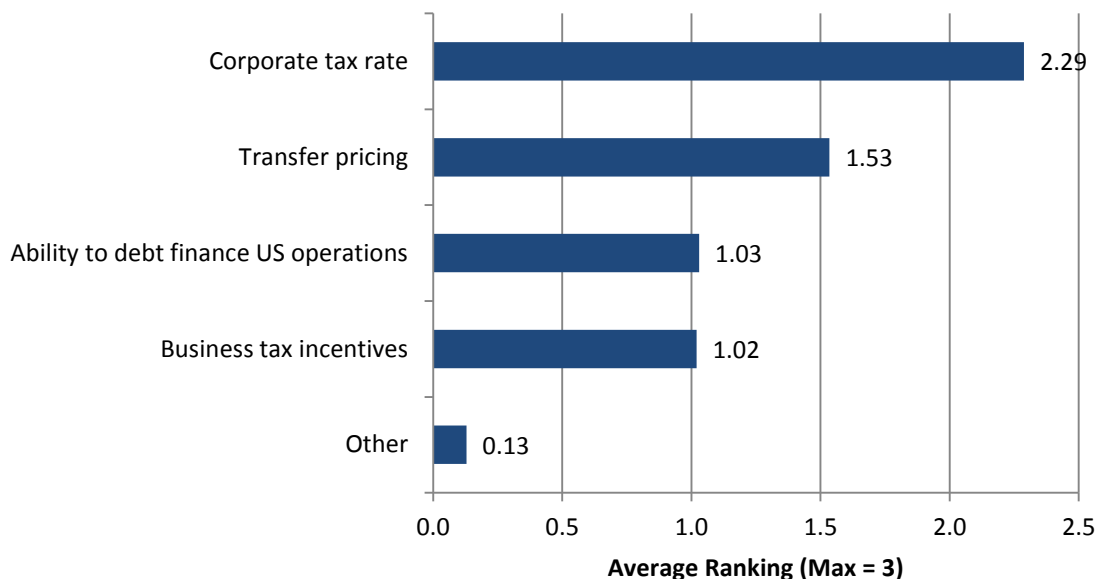
\*Includes telecommunications.

## Corporate Tax Rate is the Top Tax Policy Impacting CFO Investment Decisions

CFOs say the U.S. corporate tax rate and transfer pricing rules are the tax policies with the largest impacts on their companies (see **Figure 22**). In fact, 54 percent of insourcing CFOs indicated that the corporate tax rate is the most important aspect of U.S. federal tax policy that impacts their company (see **Figure 23**).

**Figure 22– Corporate Tax Rate Impacts CFO Investment Decisions the Most**

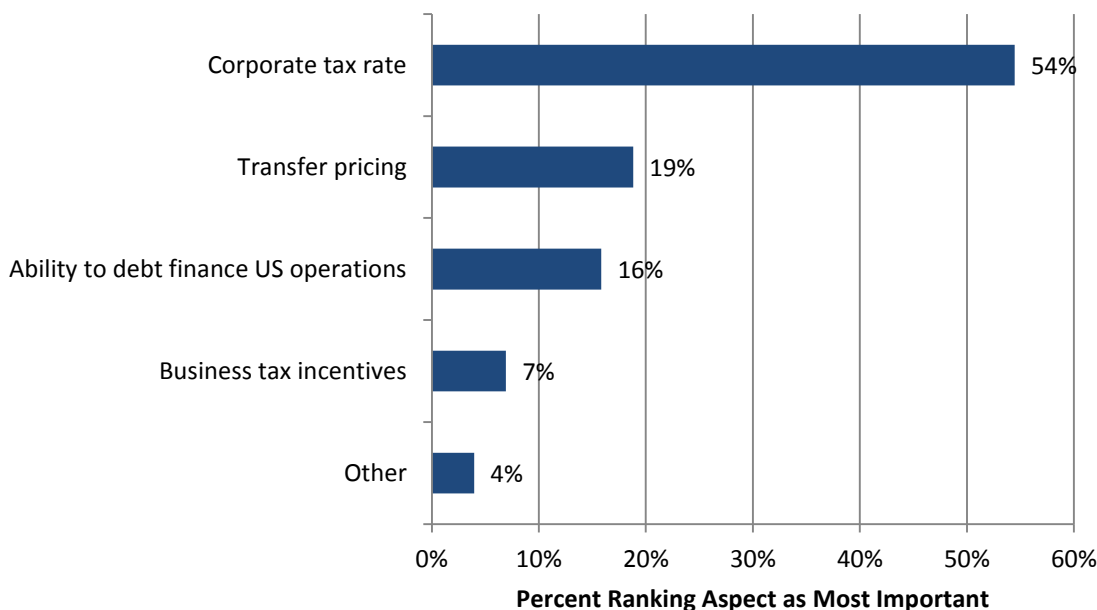
When investing in the United States, which aspect of U.S. federal tax policy impacts your company the most?



Number of respondents: 101. Values represent a weighted average where the highest ranking receives a score of 3, the lowest ranking receives a score of 1, and no ranking receives a score of 0.

**Figure 23– Majority Say Corporate Tax Rate Impacts CFO Investment Decision the Most**

When investing in the United States, which aspect of U.S. federal tax policy impacts your company the most?



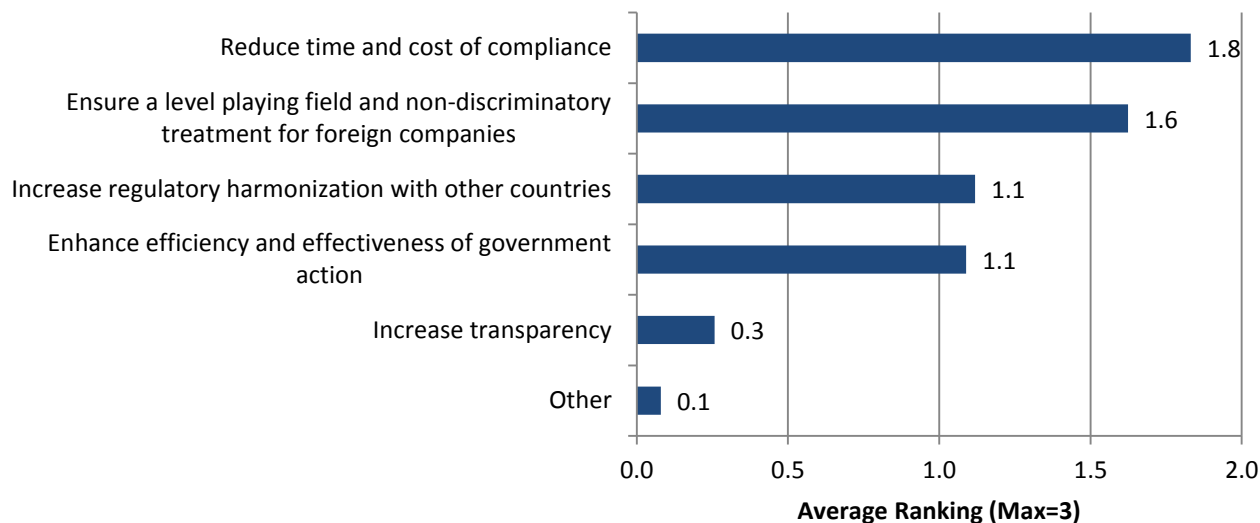
Number of respondents: 101.

## Ensuring Fair Treatment of Insourcing Companies is Critical

CFOs say the U.S. regulatory environment would be most improved by reducing the time and cost required for compliance and ensuring non-discriminatory treatment for U.S. subsidiaries with foreign parent companies (see **Figure 24**).

**Figure 24– Ways the U.S. Can Improve the Regulatory Environment**

What are the most important ways the United States can improve its federal regulatory environment in order for your company to increase investment in the United States?

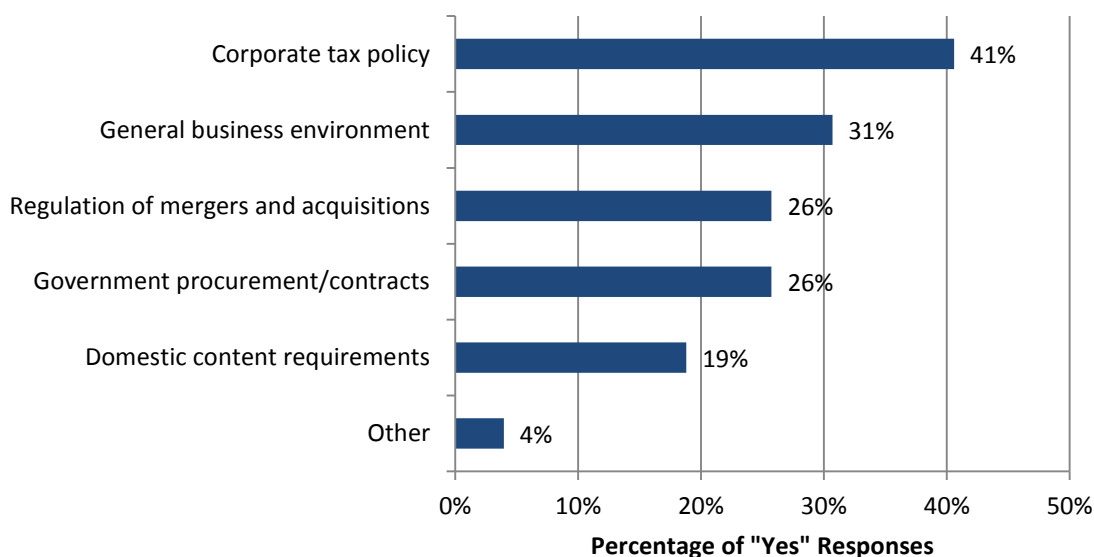


Number of respondents: 101. Values represent a weighted average where the highest ranking receives a score of 3, the lowest ranking receives a score of 1, and no ranking receives a score of 0.

CFOs say that foreign companies doing business in the United States face greater discriminatory treatment in taxation than in other areas of government policy. In fact, 41 percent of CFOs say that discriminatory corporate tax treatment has had a negative impact on their U.S. business operations or their decision to invest in the United States (see **Figure 25**).

**Figure 25– Corporate Tax Policy & General Business Environment Are the Top Issues that Negatively Impacted Foreign Companies in the U.S.**

In the past, foreign companies have faced discrimination in U.S. federal policy and regulation. Has discriminatory treatment in any of the below issue areas had a negative impact on your U.S. business operations or investment decisions?



Number of respondents: 101.

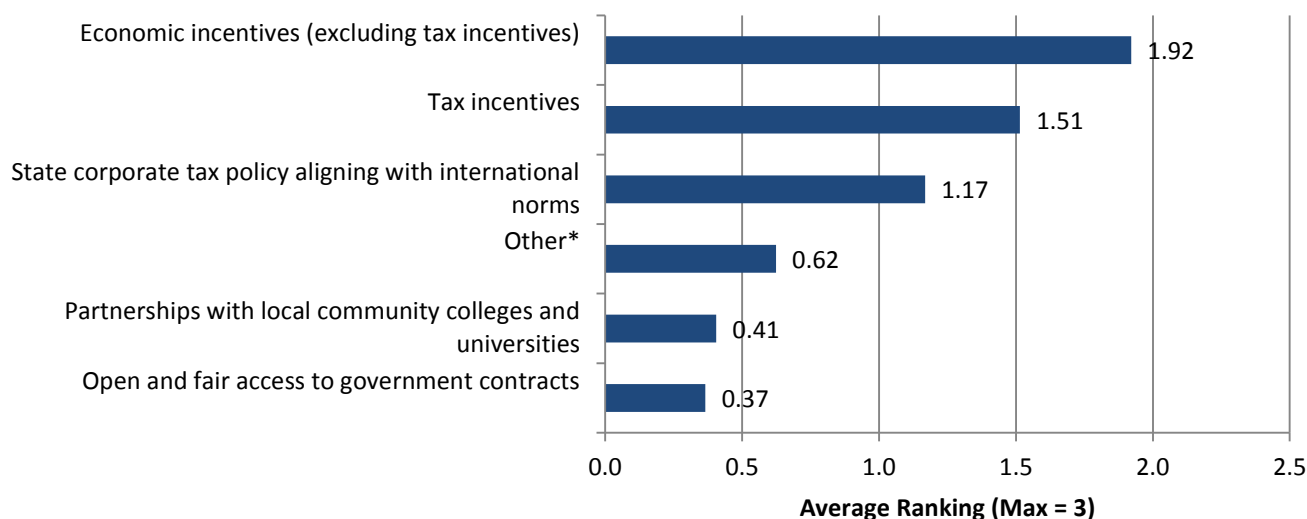
## WHAT STATES CAN DO TO ATTRACT GLOBAL INVESTMENT

### Ensure Fair Tax Treatment of Insourcing Companies

Many states compete for investment through a variety of economic and tax incentives as well as through policies and programs designed to promote a better business environment. While economic and tax incentives do help attract insourcing companies, states should also work to ensure that their tax and procurement policies align with international norms and standards. Unfair or discriminatory tax treatment would undermine a state's attractiveness to insourcing companies (see **Figure 26**).

**Figure 26– Top Factors Sought by CFOs in States**

When deciding where to invest between competing U.S. states, which are the most important factors impacting your company's decision?

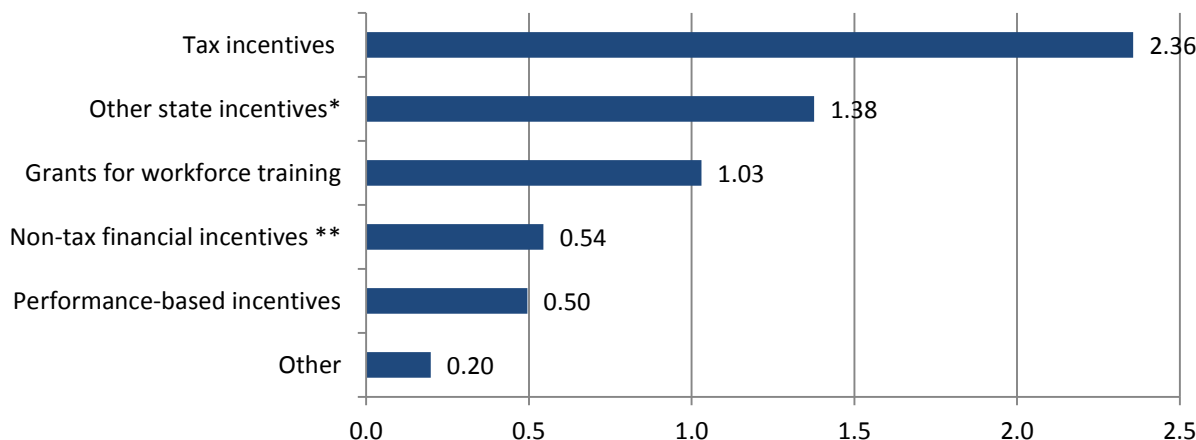


Number of respondents: 101. Values represent a weighted average where the highest ranking receives a score of 3, the lowest ranking receives a score of 1, and no ranking receives a score of 0. \*Other responses include: Skilled work force, Proximity to customers, Growth, Location of emerging technologies, Labor cost, and Energy costs.

As states evaluate local incentives for business investment, CFOs say that tax incentives (including credits, refunds, exemptions, and deductions) and other state incentives, such as infrastructure upkeep and utility rate breaks, have historically been the most valuable types of incentives (see **Figure 27**).

**Figure 27– Evaluating State Incentives**

What state and local incentives have historically been most valuable to your company when choosing to invest in a state?



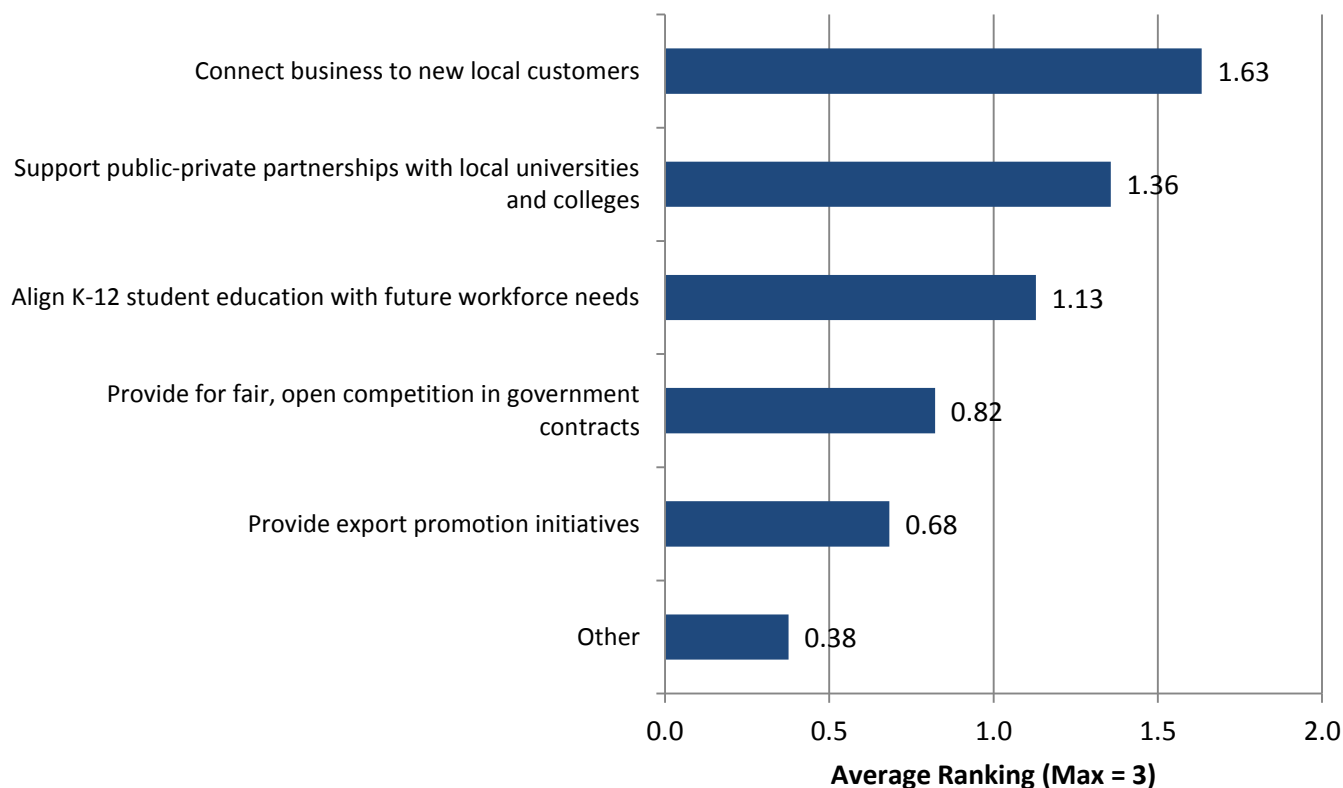
Number of respondents: 101.  
Values represent a weighted average where the highest ranking receives a score of 3, the lowest ranking receives a score of 1, and no ranking receives a score of 0. \* i.e. infrastructure upkeep and utility rate breaks. \*\*i.e. bonds, loans, and loan guarantees.

## Connect Businesses with New Local Customers and Invest in Education

Once a company has chosen a state in which to locate its investment, CFOs say connecting businesses to new customers is the most important service the public sector can provide to help companies retain or increase employment. For example, some state and local governments organize or sponsor trade shows that bring together companies, suppliers, and customers. Similarly, more than half of CFOs identified educational priorities, such as public-private partnerships with local universities and better alignment of K-12 education with future workforce needs, as the most important service state governments can provide to encourage greater investment (see **Figure 28**).

**Figure 28– Most Important Services the Public Sector Can Provide Once a Company has Located in a Specific State**

Once your company has located in a state, what are the most important services the public sector can provide to help your company grow or retain employment levels?



Number of respondents: 101.

Values represent a weighted average where the highest ranking receives a score of 3, the lowest ranking receives a score of 1, and no ranking receives a score of 0.



## APPENDIX: ABOUT THE 2014 CFO SURVEY

The 2014 U.S. Insourcing Survey was distributed by email to approximately 225 CFOs of U.S. subsidiaries of foreign companies in October 2013. The CFOs were invited to participate in the online survey, which was jointly developed by OFII and PwC and was administered by PwC. Survey responses were due in mid-January 2014.

PwC received 101 complete responses and the results presented in the report are based on these responses only. The survey responses covered companies in a number of different industries and companies of all sizes.

Responses by Industry	
Aerospace and defense	7
Automotive and auto parts	5
Chemicals	9
Consumer products	13
Energy & Mining	8
Financial services	12
Heavy manufacturing	12
IT and technology*	7
Pharmaceuticals	9
Other services	19

*\*Includes telecommunications.*

Responses by Size of Revenues	
Revenues < \$1 billion	12
\$1 billion < Revenues < \$5 billion	36
Revenues > \$5 billion	53

**From:** [Suhr, Daniel R - LTGOV](#)  
**To:** [Springer, Jessica](#)  
**Subject:** RE: Lt. Gov. Kleefisch Visit to Heritage  
**Date:** Monday, March 24, 2014 10:17:00 AM

---

Hi Jessica – Thanks for your work arranging the Lt. Governor’s visit to Heritage on Thursday. She had a wonderful time and we appreciate the warm hospitality. Thanks – DANIEL

---

**From:** Springer, Jessica [mailto:Jessica.Springer@heritage.org]  
**Sent:** Wednesday, March 19, 2014 3:44 PM  
**To:** Suhr, Daniel R - LTGOV  
**Subject:** RE: Lt. Gov. Kleefisch Visit to Heritage

Hi Daniel,

Looking forward to tomorrow and the Lt. Governor’s lecture and luncheon! Just wanted to let you know that we have ordered box lunches for the two security officers and also reserved a small room on the same floor for their use.

Let me know if you need anything else, otherwise I will see you tomorrow!

Thanks,

Jessica

---

**Jessica Springer**

*Executive Assistant to the Vice President*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6043  
[heritage.org](http://heritage.org)

---

**From:** Suhr, Daniel R - LTGOV [mailto:[Daniel.Suhr@wisconsin.gov](mailto:Daniel.Suhr@wisconsin.gov)]  
**Sent:** Thursday, March 13, 2014 12:40 PM  
**To:** Springer, Jessica  
**Subject:** RE: Lt. Gov. Kleefisch Visit to Heritage

Hi Jessica,

A few names come to mind . . . I think Jennifer Marshall is awesome and would be a great connection. Ryan Nichols from Coalition Relations is a Wisconsin guy. Ryan T. Anderson, David Azerrad, and Brittany Corona are friends of mine if they’re free. We’re actually meeting from 2-230pm with James Sherk to talk about workforce issues, so we’re good there. Beyond that, if there are folks with a Wisconsin connection, they’re welcome. And if there’s anyone who tracks state tax reform issues, that’s of particular interest at the moment.

Thanks,

DANIEL

---

**From:** Springer, Jessica [<mailto:Jessica.Springer@heritage.org>]  
**Sent:** Thursday, March 13, 2014 9:49 AM  
**To:** Suhr, Daniel R - LTGOV  
**Subject:** RE: Lt. Gov. Kleefisch Visit to Heritage

Good morning!

One more quick question. Unfortunately Steve Moore will be in Memphis, TN next week and unable to attend the luncheon. Are there any other policy areas the Lt. Governor is interested in or Heritage people she would be interested in having attend the lunch? We have a few more spots open and wanted to make sure to include those whom would be of interest to the Lt. Governor.

Thank you,

Jessica

---

**Jessica Springer**

*Executive Assistant to the Vice President*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6043  
[heritage.org](http://heritage.org)

---

**From:** Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]  
**Sent:** Wednesday, March 12, 2014 10:33 AM  
**To:** Springer, Jessica  
**Subject:** RE: Lt. Gov. Kleefisch Visit to Heritage

Hi Jessica,

Thanks for the email. I think there will be four of us – the Lt. Governor, myself, and two security officers (although they'll probably just grab food and disappear into a nearby hallway). We're pretty simple eaters – the Lt. Governor usually tends towards salads and I'm sure the three guys would all tend towards sandwiches, but we'll do whatever. We place ourselves in your hands.

Thanks,  
DANIEL

---

**From:** Springer, Jessica [<mailto:Jessica.Springer@heritage.org>]  
**Sent:** Wednesday, March 12, 2014 9:22 AM  
**To:** Suhr, Daniel R - LTGOV  
**Subject:** RE: Lt. Gov. Kleefisch Visit to Heritage

Daniel,

I am making the final plans for the luncheon after the Lt. Governor's speech next week and

wondered how many would be attending the lunch with the Lt. Governor? Are there any food allergies or requests?

Let me know if you need anything else as we plan for the event next week.

Thanks!

Jessica

---

**Jessica Springer**

*Executive Assistant to the Vice President*

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---

**From:** Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]

**Sent:** Friday, February 07, 2014 3:37 PM

**To:** Dunlop, Becky Norton; Hilboldt, John

**Cc:** Springer, Jessica

**Subject:** RE: Lt. Gov. Kleefisch Visit Heritage?

Great, thanks Becky.

John and Jessica, if we're to do a lunch and a speech our best day would be Thursday, March 20. If that doesn't work, on Wednesday, March 19, we could do a late lunch (115pm) followed by a 2 or 230 speech. If that doesn't work, we can look at a breakfast or coffee meeting with staff and then a speech. The Lt. Governor is also a big fan of Stephen Moore, who joined your Foundation recently, if he is available for the staff discussion.

Thanks,  
DANIEL

---

**From:** Dunlop, Becky Norton [<mailto:bndunlop@heritage.org>]

**Sent:** Friday, February 07, 2014 1:25 PM

**To:** Suhr, Daniel R - LTGOV; Hilboldt, John

**Cc:** Springer, Jessica

**Subject:** Re: Lt. Gov. Kleefisch Visit Heritage?

Yes! Love to try and do both a speech by her and host a lunch...perhaps with a wider circle of folks. I am copying John Hilboldt who directs our Lectures program. He can work with you on timing. Jessica keeps my schedule so she will be helping on this. Miss you here. Becky

---

**Becky Norton Dunlop**

*Vice President, External Relations*

The Heritage Foundation

214 Massachusetts Avenue, NE

Washington, DC 20002

202-546-4400

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---

**From:** Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]  
**Sent:** Friday, February 07, 2014 02:20 PM  
**To:** Dunlop, Becky Norton  
**Subject:** Lt. Gov. Kleefisch Visit Heritage?

Dear Becky,

Good afternoon. I'm writing on behalf of another Becky, Wisconsin's Lt. Governor Rebecca Kleefisch. Last year the Lt. Governor met with Heritage's executive team during a trip to D.C. and really enjoyed her time at the Foundation. The Lt. Governor is going to be back in D.C. next month for the NLGA, and I'm writing to see if Heritage would be interested in hosting her again. In particular, I wanted to ask if Heritage could provide a forum for the Lt. Governor to give remarks on Wisconsin's recent economic success and our plan to give the subsequent revenue surplus back in the form of major tax relief (for an outline of the tax plan, see <http://walker.wi.gov/newsroom/press-release/governor-scott-walker-delivers-remarks-wmc-business-day-madison>). Wisconsin's got a great story to tell, and we'd love to share it at Heritage. We have lots of flexibility on her calendar for March 19, 20, and 21. Please call me at 608-261-2158 to discuss this or other possibilities for her to engage with Heritage while in D.C.

Hope you're enjoying Sarasota and CNP – sorry I couldn't be there for this one. I'll see you in March hopefully and then again in May in McLean.

Thanks – DANIEL

Daniel R. Suhr, Chief of Staff  
Lt. Governor Rebecca Kleefisch  
608.266.3516 (office)

**From:** [Sherk, James](#)  
**To:** [Suhr, Daniel R - LTGOV](#)  
**Subject:** RE: HB 496 RTW Testimony-DTobergte NKY Tri-ED 3-13-14.docx  
**Date:** Tuesday, December 2, 2014 2:17:25 PM

---

Daniel, it was great meeting with you again too. I'll certainly keep you in the loop going forward.

Best,

James

James Sherk  
Senior Policy Analyst in Labor Economics  
Institute for Economic Freedom and Opportunity  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)

-----Original Message-----

From: Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]  
Sent: Tuesday, December 02, 2014 2:43 PM  
To: Sherk, James  
Subject: RE: HB 496 RTW Testimony-DTobergte NKY Tri-ED 3-13-14.docx

Hi James -- thanks for being proactive and working with Ryan to stop by and meet with us -- really glad we could sit down, you always bring new and interesting ideas to the table. Please keep us in the loop as things unfold. --

DANIEL \_\_\_\_\_

From: Sherk, James [[James.Sherk@heritage.org](mailto:James.Sherk@heritage.org)]  
Sent: Tuesday, November 25, 2014 3:05 PM  
To: Suhr, Daniel R - LTGOV  
Subject: HB 496 RTW Testimony-DTobergte NKY Tri-ED 3-13-14.docx

Daniel,

It was good seeing you again this afternoon. Here is the Kentucky economic development testimony I mentioned earlier.

Best,

James

---

James Sherk  
Senior Policy Analyst in Labor Economics Institute for Economic Freedom and Opportunity The Heritage  
Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)<<http://heritage.org/>>

**From:** [Governor Scott Walker](#)  
**To:** [Schick, Kathryn - GOV](#); [Caroline Schultz](#)  
**Subject:** FW: State of the State  
**Date:** Wednesday, January 7, 2015 11:59:00 AM

---

FYI

**Alan Colvin**  
*Constituent Services Director*  
*Office of the Governor*  
**608-266-1212**  
[alan.colvin@wisconsin.gov](mailto:alan.colvin@wisconsin.gov)

---

**From:** McIntyre, Ken [mailto:Ken.McIntyre@Heritage.org]  
**Sent:** Tuesday, January 06, 2015 1:39 PM  
**To:** Governor Scott Walker  
**Subject:** State of the State

To whom it may concern: Will the Governor deliver a State of the State address this year, or did his second inaugural address serve that function? Many thanks, Ken McIntyre

---

**Ken McIntyre**

*News Director, The Daily Signal and Marilyn and Fred Guardabassi Fellow in Media and Public Policy*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6147  
[heritage.org](http://heritage.org)

**From:** [Sherk, James](#)  
**Subject:** FW: How Right-to-Work Impacts Union Dues and Union Officer Salaries  
**Date:** Wednesday, January 14, 2015 2:11:39 PM  
**Attachments:** [Right-to-Work.docx](#)

---

FYI, you may find this interesting. We will be releasing a report next week that finds that unions charge their members 10 percent higher dues and pay their top officers an average of \$20,000 more a year in states without right-to-work laws. In other words, they act like any other monopoly – charging higher prices and doing less to hold down costs when their customers have no options. We will be hosting a panel discussion on Monday the 26<sup>th</sup> to discuss these findings. Besides myself going through the findings, we will have Mike Buchanon explaining why Warren Co. passed a local right-to-work ordinance and Terry Bowman describing his experience as a union member in a newly right-to-work state. If you can't attend the panel in person it will also be streamed online.

Best,

James

---

**James Sherk**  
*Senior Policy Analyst in Labor Economics*  
*Institute for Economic Freedom and Opportunity*  
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---

**From:** Hilboldt, John  
**Sent:** Wednesday, January 14, 2015 1:15 PM  
**To:** Hilboldt, John  
**Subject:** How Right-to-Work Impacts Union Dues and Union Officer Salaries

**See attached. Please distribute to all appropriate departmental and personal mailing lists. Thank you.**

Heritage Foundation



**INVITATION**



# How Right-to-Work Impacts Union Dues and Union Officer Salaries

Featuring

**Michael Buchanon**

Judge-Executive, Warren County, Kentucky

**Terry Bowman**

United Auto Workers' member and Ford employee in Michigan

**James Sherk**

Senior Policy Analyst in Labor Economics, The Heritage Foundation

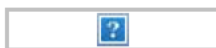
Monopolies charge their customers higher prices and care less about controlling costs. New research from The Heritage Foundation shows labor unions act just like business monopolies in this regard. Union financial filings reveal unions in non-right-to-work states charge workers 10 percent more. They also pay their top full-time officers \$20,000 more a year. Unions charge monopoly prices and pay monopoly salaries when they can force workers to pay their dues.

Several states and local governments are considering or have passed right-to-work laws that prevent such abuses. Right-to-work laws make union dues optional; they require unions to earn their members' voluntary support. In 2012 Michigan became a right-to-work state. This past December Warren County, Kentucky – which includes Bowling Green – became the first county in America with a local right-to-work ordinance.

Join us as our panelists discuss the consequences of right-to-work. James Sherk will present his new research on how right-to-work impacts union behavior. Michael Buchanon, Warren County's Judge-Executive, will explain why his county enacted a right-to-work ordinance and how he expects it will benefit workers. Terry Bowman will discuss his experiences as a union member in a newly right-to-work state.

**Monday, January 26, 2015 at 12:00 p.m.**

**The Heritage Foundation's Lehrman Auditorium**



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*Cordially Invites You*

# **How Right-to-Work Impacts Union Dues and Union Officer Salaries**

*Featuring*

**Michael Buchanon**

Judge-Executive, Warren County, Kentucky

**Terry Bowman**

United Auto Workers' member and Ford employee in Michigan

**James Sherk**

Senior Policy Analyst in Labor Economics, The Heritage Foundation

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Join us as our panelists discuss the consequences of right-to-work. James Sherk will present his new research on how right-to-work impacts union behavior. Michael Buchanon, Warren County's Judge-Executive, will explain why his county enacted a right-to-work ordinance and how he expects it will benefit workers. Terry Bowman will discuss his experiences as a union member in a newly right-to-work state.

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News media inquiries, call (202) 675-1761

**214 Massachusetts Avenue, NE | Washington, DC 20002 | (202) 546-4400**

**From:** [Sherk, James](#)  
**To:** [Suhr, Daniel R - LTGOV](#)  
**Subject:** FW: Now Online: Unions Charge Higher Dues and Pay Their Officers Larger Salaries in Non-Right-to-Work States  
**Date:** Monday, January 26, 2015 9:49:29 AM

---

You may find this new report interesting ...

---

**James Sherk**  
*Senior Policy Analyst in Labor Economics*  
*Institute for Economic Freedom and Opportunity*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)

---

**From:** Now Online  
**Sent:** Monday, January 26, 2015 10:10 AM  
**To:** Now Online Distribution  
**Cc:** Sherk, James  
**Subject:** Now Online: Unions Charge Higher Dues and Pay Their Officers Larger Salaries in Non-Right-to-Work States

**Unions Charge Higher Dues and Pay Their Officers Larger Salaries in Non-Right-to-Work States**  
<http://www.heritage.org/research/reports/2015/01/unions-charge-higher-dues-and-pay-their-officers-larger-salaries-in-nonright-to-work-states>

by James Sherk  
Backgrounder #2987  
January 26, 2015

*In the absence of competition, businesses charge their customers higher prices and care less about controlling costs. Labor unions do the same. Half of U.S. states allow unions to force workers to pay dues as a condition of employment. In these states unions charge 10 percent higher dues and pay their top officers \$20,000 more a year. The remaining states have right-to-work laws that make union dues voluntary. These laws prevent unions from exploiting their monopoly and reduce the cost of union representation for workers.*

**Related issues:** Labor Regulation

**From:** [Suhr, Daniel R - LTGOV](#)  
**To:** [Sherk, James](#)  
**Subject:** RE: Invitation for Gov. Walker to keynote the Heritage Foundation Workers' Empowerment Summit  
**Date:** Tuesday, September 22, 2015 9:49:00 AM

---

Hi James – Yes, the Governor's schedule just became a lot more open, so let me talk to the team and get this on their radar. I'll let you know promptly; otherwise you may hear from Alicia or Mallory from the scheduling office. Thanks – DANIEL

---

**From:** Sherk, James [mailto:James.Sherk@heritage.org]  
**Sent:** Tuesday, September 22, 2015 8:08 AM  
**To:** Suhr, Daniel R - LTGOV  
**Cc:** Matt Patterson  
**Subject:** RE: Invitation for Gov. Walker to keynote the Heritage Foundation Workers' Empowerment Summit

Daniel,

I imagine things have been a bit chaotic for you guys just now. If Gov. Walker is interested in speaking we would still love to have him keynote the summit. And since he is no longer a candidate he should be free to talk about why he thought his proposed labor reforms made a lot of sense.

James

---

**James Sherk**

*Research Fellow, Labor Economics*  
*Institute for Economic Freedom and Opportunity*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)

---

**From:** Sherk, James  
**Sent:** Friday, September 18, 2015 11:50 AM  
**To:** [daniel.suhr@wisconsin.gov](mailto:daniel.suhr@wisconsin.gov)  
**Cc:** Matt Patterson  
**Subject:** Invitation for Gov. Walker to keynote the Heritage Foundation Workers' Empowerment Summit

Daniel,

I don't know if you are the right person to send this to. If not, could you forward it to the right person in the Governors' office?

Would Gov. Walker be interested in speaking a Summit on Workers' Empowerment that the Heritage Foundation, Americans for Tax Reform, and Center for Union Facts will be hosting on Tuesday, October 6<sup>th</sup>. The next day the White House is hosting a "Summit on Workers' Voice" which will be a cheerleading session for unions and collective bargaining. We want to highlight that unions are not the answer to most workers' problems, can hurt workers, and that government imposed barriers such as licensing or freezing out companies like Uber often pose larger barriers to workers

trying to get ahead. Given Gov. Walker's extensive involvement in labor issues he would be an ideal candidate to keynote the event.

I've attached the draft schedule and event announcement (which we intend to send out Monday, with formatting – it won't look like the raw text). The Summit will feature an introductory talk, probably by me, going over some of the bad economics common on the left, explaining why it is wrong (e.g. pay growth has tracked productivity growth quite closely), and how the labor market has changed recently. Then we will have two panels. The first will feature workers who have seen the darker side of Organized Labor explaining why union membership is not the solution to their problems, and why their lives would be (or are) worse off with a union. The second will feature workers hurt by occupational licensing, where the government has tried to prevent them from working in jobs they were doing quite well at – simply because they lacked a totally unnecessary license.

If Gov. Walker is available we would love to have him come give the keynote address following these two panels. Since Heritage is a (c)(3) we can't invite him to talk about his recently released labor reform platform. This is also why I have reached out to you and not his campaign staff. We are inviting him in his capacity as Governor, not in his capacity and POTUS candidate. Here are the legal guidelines for speakers we operate under:

Candidates for public office may speak at The Heritage Foundation in a non-candidate capacity, which requires that they have a particular position, knowledge, or skill that independently justifies such an appearance. A current Member of Congress who is also a candidate may speak at Heritage, provided that he or she (1) does so solely in his or her capacity as a Member of Congress, and not as a candidate, (2) limits his or her remarks to public policy issues relevant to his or her position as a Member of Congress, (3) does not mention any campaign, election, or candidate for public office, and (4) does not make any appeal for electoral support, votes, or campaign contributions.

As a Governor Scott Walker has had a huge impact on labor policy. He could talk about the importance of right-to-work and union re-election votes in holding unions accountable to their members so they can't simply do what the leadership wants to do despite the members' desires. If I recall correctly Gov. Walker also put a moratorium on licensing new occupations when he took office. He could talk about that and how he sees the economy changing for workers and generally how state policymakers like himself should respond.

Regards,

James

**From:** [Sherk, James](#)  
**To:** [Suhr, Daniel R - LTGOV](#)  
**Subject:** RE: Invitation for Gov. Walker to keynote the Heritage Foundation Workers' Empowerment Summit  
**Date:** Tuesday, September 22, 2015 9:51:29 AM

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Thanks Daniel!

---

**James Sherk**  
*Research Fellow, Labor Economics*  
*Institute for Economic Freedom and Opportunity*  
The Heritage Foundation  
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202-608-6177  
[heritage.org](http://heritage.org)

---

**From:** Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]  
**Sent:** Tuesday, September 22, 2015 10:49 AM  
**To:** Sherk, James  
**Subject:** RE: Invitation for Gov. Walker to keynote the Heritage Foundation Workers' Empowerment Summit

Hi James – Yes, the Governor's schedule just became a lot more open, so let me talk to the team and get this on their radar. I'll let you know promptly; otherwise you may hear from Alicia or Mallory from the scheduling office. Thanks – DANIEL

---

**From:** Sherk, James [<mailto:James.Sherk@heritage.org>]  
**Sent:** Tuesday, September 22, 2015 8:08 AM  
**To:** Suhr, Daniel R - LTGOV  
**Cc:** Matt Patterson  
**Subject:** RE: Invitation for Gov. Walker to keynote the Heritage Foundation Workers' Empowerment Summit

Daniel,

I imagine things have been a bit chaotic for you guys just now. If Gov. Walker is interested in speaking we would still love to have him keynote the summit. And since he is no longer a candidate he should be free to talk about why he thought his proposed labor reforms made a lot of sense.

James

---

**James Sherk**  
*Research Fellow, Labor Economics*  
*Institute for Economic Freedom and Opportunity*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)

---

**From:** Sherk, James  
**Sent:** Friday, September 18, 2015 11:50 AM  
**To:** [daniel.suhr@wisconsin.gov](mailto:daniel.suhr@wisconsin.gov)  
**Cc:** Matt Patterson  
**Subject:** Invitation for Gov. Walker to keynote the Heritage Foundation Workers' Empowerment Summit

Daniel,

I don't know if you are the right person to send this to. If not, could you forward it to the right person in the Governors' office?

Would Gov. Walker be interested in speaking at a Summit on Workers' Empowerment that the Heritage Foundation, Americans for Tax Reform, and Center for Union Facts will be hosting on Tuesday, October 6<sup>th</sup>. The next day the White House is hosting a "Summit on Workers' Voice" which will be a cheerleading session for unions and collective bargaining. We want to highlight that unions are not the answer to most workers' problems, can hurt workers, and that government imposed barriers such as licensing or freezing out companies like Uber often pose larger barriers to workers trying to get ahead. Given Gov. Walker's extensive involvement in labor issues he would be an ideal candidate to keynote the event.

I've attached the draft schedule and event announcement (which we intend to send out Monday, with formatting – it won't look like the raw text). The Summit will feature an introductory talk, probably by me, going over some of the bad economics common on the left, explaining why it is wrong (e.g. pay growth has tracked productivity growth quite closely), and how the labor market has changed recently. Then we will have two panels. The first will feature workers who have seen the darker side of Organized Labor explaining why union membership is not the solution to their problems, and why their lives would be (or are) worse off with a union. The second will feature workers hurt by occupational licensing, where the government has tried to prevent them from working in jobs they were doing quite well at – simply because they lacked a totally unnecessary license.

If Gov. Walker is available we would love to have him come give the keynote address following these two panels. Since Heritage is a (c)(3) we can't invite him to talk about his recently released labor reform platform. This is also why I have reached out to you and not his campaign staff. We are inviting him in his capacity as Governor, not in his capacity as POTUS candidate. Here are the legal guidelines for speakers we operate under:

Candidates for public office may speak at The Heritage Foundation in a non-candidate capacity, which requires that they have a particular position, knowledge, or skill that independently justifies such an appearance. A current Member of Congress who is also a candidate may speak at Heritage, provided that he or she (1) does so solely in his or her capacity as a Member of Congress, and not as a candidate, (2) limits his or her remarks to public policy issues relevant to his or her position as a Member of Congress, (3) does not mention any campaign, election, or candidate for public office, and (4) does not make any appeal for electoral support, votes, or campaign contributions.



As a Governor Scott Walker has had a huge impact on labor policy. He could talk about the importance of right-to-work and union re-election votes in holding unions accountable to their members so they can't simply do what the leadership wants to do despite the members' desires. If I recall correctly Gov. Walker also put a moratorium on licensing new occupations when he took office. He could talk about that and how he sees the economy changing for workers and generally how state policymakers like himself should respond.

Regards,

James

**From:** [Sherk, James](#)  
**Subject:** FW: Now Online: Union Membership and Compulsory Dues Do Not Increase Workers' Overall Living Standards  
**Date:** Tuesday, November 10, 2015 10:37:22 AM

---

Friends interested in labor issues,

You may find this new Backgrounder interesting. It examines wages in right-to-work (RTW) states and non-RTW states. Right-to-work states have lower average wages than non-RTW states. But they also have much lower living costs. After fully controlling for living cost differences real wages are identical in RTW and non-RTW states. Earlier studies that find RTW laws lower pay came to that conclusion by incompletely controlling for differences in living costs. RTW laws do appear to cut the pay of government employees by about 5% -- possibly by reducing the political clout of gov't unions. But in the private sector they have no detectable effect on wages. RTW states do have about a percentage point lower unemployment rate than states with compulsory dues.

Regards,

James

---

**James Sherk**  
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*Institute for Economic Freedom and Opportunity*  
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Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)

---

**From:** Now Online  
**Sent:** Monday, November 09, 2015 5:27 PM  
**To:** Now Online Distribution  
**Subject:** Now Online: Union Membership and Compulsory Dues Do Not Increase Workers' Overall Living Standards

**Union Membership and Compulsory Dues Do Not Increase Workers' Overall Living Standards**

<http://www.heritage.org/research/reports/2015/11/union-membership-and-compulsory-dues-do-not-increase-workers-overall-living-standards>

By James Sherk

*Backgrounder #3051*

November 9, 2015

*Unions and the many politicians who support them believe that increasing union membership would raise workers' wages. They argue that unions benefit workers so much that the government should force workers to pay union dues. However, unions act as labor monopolies that slightly reduce overall living standards. Unions can only increase their members' wages by restricting employment opportunities for non-union workers. To empirically assess whether unions raise wages, this paper compares cost-of-living-adjusted wages between right-to-work states and states that force workers to pay union dues. Private-sector workers*

*earn statistically indistinguishable real wages in both states. Right-to-work laws are associated with slightly lower wages for government employees—and significantly lower unemployment rates overall. Earlier union-backed studies that came to the opposite conclusion did so by only partially controlling for differences in cost of living. Unions do not provide general economic benefits that would justify forcing workers to pay union dues.*

**From:** [Sherk, James](#)  
**To:** [Suhr, Daniel R - LTGOV](#)  
**Cc:** [Greszler, Rachel](#)  
**Subject:** RE: Intro?  
**Date:** Thursday, January 28, 2016 4:23:57 PM

---

Rachel: Meet Daniel Suhr, Chief of Staff to Wisconsin Lt. Gov. Rebecca Kleefisch. Daniel is a great guy and very conservative. He wanted to reach out to you to discuss entitlement reforms.

Daniel: Take it away ...

---

**James Sherk**  
*Research Fellow, Labor Economics*  
*Institute for Economic Freedom and Opportunity*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)

---

**From:** Suhr, Daniel R - LTGOV [mailto:[Daniel.Suhr@wisconsin.gov](mailto:Daniel.Suhr@wisconsin.gov)]  
**Sent:** Thursday, January 28, 2016 5:00 PM  
**To:** Sherk, James  
**Subject:** Intro?

Hi James – Could you do an e-introduction for me with your Heritage colleague Rachel Greszler? I think she works on labor issues as well but more from the entitlement reform side... Thanks –  
DANIEL

Daniel R. Suhr, Chief of Staff  
Lt. Governor Rebecca Kleefisch  
608.266.3516 (office)

**From:** [Greszler, Rachel](#)  
**To:** [Suhr, Daniel R - LTGOV](#)  
**Subject:** RE: Intro?  
**Date:** Monday, February 1, 2016 1:07:16 PM

---

Daniel,  
I just called, but then I realized that when I said 2:00 my time, I said 3:00 your time, when I should have said 1:00. Feel free to call me over the next hour (I've got a 3:00 meeting), or let me know when is a good time to call you back.  
My voice mail isn't working now, so just email if you get my VM.  
Rachel

Rachel Greszler  
Senior Policy Analyst, Economics and Entitlements  
Institute for Economic Freedom and Opportunity  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6247  
[heritage.org](http://heritage.org)

-----Original Message-----

From: Greszler, Rachel  
Sent: Saturday, January 30, 2016 9:57 AM  
To: Suhr, Daniel R - LTGOV  
Subject: Re: Intro?

How about 2:00 EST on Monday (I think that's 3:00 for you)? I see your number at the bottom of this chain, so I'll call you.

Sent from my iPhone

> On Jan 29, 2016, at 11:23 AM, Suhr, Daniel R - LTGOV <[Daniel.Suhr@wisconsin.gov](mailto:Daniel.Suhr@wisconsin.gov)> wrote:

>

> Hi Rachel -- You can pick your time Monday or Tuesday afternoon; hope  
> you're enjoying Disney! - DANIEL

>

> -----Original Message-----

> From: Greszler, Rachel [<mailto:Rachel.Greszler@heritage.org>]

> Sent: Thursday, January 28, 2016 8:51 PM

> To: Suhr, Daniel R - LTGOV

> Cc: Sherk, James

> Subject: Re: Intro?

>

> Daniel,

> I would love to chat. I saw Lt. Gov. Kleefisch speak at Heritage a while back and I was so impressed! I am actually on vacation this week, but leaving disney tomorrow. If you want to talk tomorrow, I can call you sometime after 2 (EST). If next week is just as good, let's set up a time Monday or Tuesday when I'm at work.

> Rachel

>

> Sent from my iPhone

>

> On Jan 28, 2016, at 5:25 PM, Suhr, Daniel R - LTGOV

<Daniel.Suhr@wisconsin.gov<<mailto:Daniel.Suhr@wisconsin.gov>>> wrote:

>

> Thanks, James, appreciate it. You're a great American.

>

> Rachel, would it be possible for us to chat briefly on the phone sometime tomorrow? My number is 608-261-2158. Heard you on the Federalist Radio Hour via podcast the other day and wanted to tap your expertise... I'm at my desk pretty much the whole day tomorrow. Thanks!

>

>

>

---

> Rachel Greszler

> Senior Policy Analyst, Economics and Entitlements Institute for

> Economic Freedom and Opportunity The Heritage Foundation

> 214 Massachusetts Avenue, NE

> Washington, DC 20002

> 202-608-6247

> [heritage.org](http://heritage.org)<<http://heritage.org>>

> From: Sherk, James [<mailto:James.Sherk@heritage.org>]

> Sent: Thursday, January 28, 2016 4:24 PM

> To: Suhr, Daniel R - LTGOV

> Cc: Greszler, Rachel

> Subject: RE: Intro?

>

> Rachel: Meet Daniel Suhr, Chief of Staff to Wisconsin Lt. Gov. Rebecca Kleefisch. Daniel is a great guy and very conservative. He wanted to reach out to you to discuss entitlement reforms.

>

> Daniel: Take it away ...

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>

---

> James Sherk

> Research Fellow, Labor Economics

> Institute for Economic Freedom and Opportunity The Heritage Foundation

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> Washington, DC 20002

> 202-608-6177

> [heritage.org](http://heritage.org)<<http://heritage.org>>

> From: Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]

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> To: Sherk, James

> Subject: Intro?

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> colleague Rachel Greszler? I think she works on labor issues as well

> but more from the entitlement reform side... Thanks – DANIEL

>

> Daniel R. Suhr, Chief of Staff

> Lt. Governor Rebecca Kleefisch

> 608.266.3516 (office)

>

**From:** [Suhr, Daniel R - LTGOV](#)  
**To:** [Greszler, Rachel](#)  
**Subject:** RE: Intro?  
**Date:** Tuesday, February 2, 2016 11:00:00 AM

---

Thanks for taking my call Rachel, appreciate your help and insights!

-----Original Message-----

From: Greszler, Rachel [<mailto:Rachel.Greszler@heritage.org>]  
Sent: Monday, February 01, 2016 1:07 PM  
To: Suhr, Daniel R - LTGOV  
Subject: RE: Intro?

Daniel,

I just called, but then I realized that when I said 2:00 my time, I said 3:00 your time, when I should have said 1:00. Feel free to call me over the next hour (I've got a 3:00 meeting), or let me know when is a good time to call you back.

My voice mail isn't working now, so just email if you get my VM.

Rachel

Rachel Greszler

Senior Policy Analyst, Economics and Entitlements Institute for Economic Freedom and Opportunity The Heritage Foundation

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Sent: Saturday, January 30, 2016 9:57 AM  
To: Suhr, Daniel R - LTGOV  
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Sent from my iPhone

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> -----Original Message-----

> From: Greszler, Rachel [<mailto:Rachel.Greszler@heritage.org>]

> Sent: Thursday, January 28, 2016 8:51 PM

> To: Suhr, Daniel R - LTGOV

> Cc: Sherk, James

> Subject: Re: Intro?

>

> Daniel,

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>

>

>

---

> Rachel Greszler

> Senior Policy Analyst, Economics and Entitlements Institute for

> Economic Freedom and Opportunity The Heritage Foundation

> 214 Massachusetts Avenue, NE

> Washington, DC 20002

> 202-608-6247

> heritage.org<<http://heritage.org/>>

> From: Sherk, James [<mailto:James.Sherk@heritage.org>]

> Sent: Thursday, January 28, 2016 4:24 PM

> To: Suhr, Daniel R - LTGOV

> Cc: Greszler, Rachel

> Subject: RE: Intro?

>

> Rachel: Meet Daniel Suhr, Chief of Staff to Wisconsin Lt. Gov. Rebecca Kleefisch. Daniel is a great guy and very conservative. He wanted to reach out to you to discuss entitlement reforms.

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> Daniel: Take it away ...

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---

> James Sherk

> Research Fellow, Labor Economics

> Institute for Economic Freedom and Opportunity The Heritage Foundation

> 214 Massachusetts Avenue, NE

> Washington, DC 20002

> 202-608-6177

> heritage.org<<http://heritage.org/>>

> From: Suhr, Daniel R - LTGOV [<mailto:Daniel.Suhr@wisconsin.gov>]

> Sent: Thursday, January 28, 2016 5:00 PM

> To: Sherk, James

> Subject: Intro?

>

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> but more from the entitlement reform side... Thanks – DANIEL

>

> Daniel R. Suhr, Chief of Staff

> Lt. Governor Rebecca Kleefisch

> 608.266.3516 (office)

>



**From:** [Sherk, James](#)  
**Subject:** FW: Heritage Research Release - How Collective Bargaining Affects State and Local Government Finances  
**Date:** Tuesday, April 5, 2016 11:41:11 AM  
**Attachments:** [image001.png](#)  
[State Collective Bargaining.doc](#)

---

FYI, next Tuesday Heritage is releasing a comprehensive examination of the effect of union collective bargaining powers on state and local government spending. We will also be doing an event on Tuesday with the study authors and Ben Wilterdink from ALEC to discuss the study and its implications (the short version – collective bargaining in government means a \$2,300 to \$3,000 higher tax bill for the average family of four). I thought you might find the study interesting. If you can't make the event in person, it will also be live-streamed online.

Best,

James

---

**James Sherk**  
*Research Fellow, Labor Economics*  
*Institute for Economic Freedom and Opportunity*  
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Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)

---

**From:** Hilboldt, John  
**Sent:** Tuesday, April 05, 2016 11:06 AM  
**To:** Hilboldt, John  
**Subject:** How Collective Bargaining Affects State and Local Government Finances

**See attached. Please distribute to all appropriate departmental and personal mailing lists. Thank you.**



**INVITATION**

~ Research Release ~

# How Collective Bargaining Affects State and Local Government Finances

*Featuring*

**Geoffrey Lawrence**

Assistant State Controller of Nevada and former Director of Research,  
Nevada Policy Research Institute

**Cameron Belt**

Senior Economist, RCG Economics, LLC

**Ben Wilterdink**

Director of the Commerce, Insurance, and Economic Development Task Force,  
American Legislative Exchange Council

**Kevin D. Dayaratna, Ph.D.**

Senior Statistician and Research Programmer, The Heritage Foundation

*Hosted by*

**James Sherk**

Research Fellow in Labor Economics, Center for Data Analysis,  
Institute for Economic Freedom and Opportunity, The Heritage Foundation

Americans must file their tax returns by April 15. Their state and local government tax bills will vary considerably. For Virginians the average cost of these taxes is \$4,500 per capita; yet neighboring Marylanders average \$5,600 per capita. New research from The Heritage Foundation and the Nevada Policy Research Institute (NPRI) quantifies a major factor increasing spending and taxes in some states, but not others. Many states give government unions collective bargaining powers, allow union members to strike, or call an arbitrator to impose terms. Other states make collective bargaining optional or prohibit it altogether. Analyzing over five decades of data, Heritage and NPRI examined how these collective bargaining powers affect state payrolls, employment and finances. Among their findings: mandatory collective bargaining increases total state and local government spending between \$600 and \$750 per capita, and if government collective bargaining were voluntary nationwide state and local governments would have spent between \$127 and \$164 billion less in 2014. Join us for a discussion of these and other findings, their implications for taxpayers, and the collective bargaining reforms that could significantly reduce costs at the state and local government level.

**Tuesday, April 12, 2016 at 12:00 p.m.**

**The Heritage Foundation's Lehrman Auditorium**

**RSVP**

RSVP online | or call (202) 675-1752  
Terms and conditions of attendance are posted at [www.heritage.org/Events/terms](http://www.heritage.org/Events/terms)  
All events may be viewed live at [heritage.org](http://heritage.org)  
News media inquiries, call (202) 675-1761

**214 Massachusetts Avenue, NE | Washington, DC 20002 | (202) 546-4400**



*The*



*Heritage Foundation*

*~ Research Release ~*

# **How Collective Bargaining Affects State and Local Government Finances**

*Featuring*

**Geoffrey Lawrence**

Assistant State Controller of Nevada and former Director of Research, Nevada Policy Research Institute

**Cameron Belt**

Senior Economist, RCG Economics, LLC

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*Hosted by*

**James Sherk**

Research Fellow in Labor Economics, Center for Data Analysis, Institute for Economic Freedom and Opportunity,  
The Heritage Foundation

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**214 Massachusetts Avenue, NE | Washington, DC 20002 | (202) 546-4400**

**From:** [Sherk, James](#)  
**Subject:** Collective Bargaining & Government Spending Event Moved to Tuesday, April 26th  
**Date:** Friday, April 15, 2016 1:40:11 PM  
**Attachments:** [image001.png](#)  
[State Collective Bargaining.doc](#)

---

Friends,

Our event on the costs collective bargaining imposes on state and local government budgets has been rescheduled for Tuesday, April 26<sup>th</sup>. I hope you can make it; if you plan on coming you can RSVP below or watch online.

James

---

**James Sherk**  
*Research Fellow, Labor Economics*  
*Institute for Economic Freedom and Opportunity*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)

---

**From:** Hilboldt, John  
**Sent:** Friday, April 15, 2016 1:39 PM  
**To:** Hilboldt, John  
**Subject:** How Collective Bargaining Affects State and Local Government Finances

**See attached. Please distribute to all appropriate departmental and personal mailing lists. Thank you.**



**INVITATION**

~ Research Release ~

## **How Collective Bargaining Affects State and Local Government Finances**

*Featuring*

**Geoffrey Lawrence**

Assistant State Controller of Nevada and former Director of Research,  
Nevada Policy Research Institute

**Ben Wilterdink**

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Americans must file their tax returns by April 15. Their state and local government tax bills will vary considerably. For Virginians the average cost of these taxes is \$4,500 per capita; yet neighboring Marylanders average \$5,600 per capita. New research from The Heritage Foundation and the Nevada Policy Research Institute (NPRI) quantifies a major factor increasing spending and taxes in some states, but not others. Many states give government unions collective bargaining powers, allow union members to strike, or call an arbitrator to impose terms. Other states make collective bargaining optional or prohibit it altogether. Analyzing over five decades of data, Heritage and NPRI examined how these collective bargaining powers affect state payrolls, employment and finances. Among their findings: mandatory collective bargaining increases total state and local government spending between \$600 and \$750 per capita, and if government collective bargaining were voluntary nationwide state and local governments would have spent between \$127 and \$164 billion less in 2014. Join us for a discussion of these and other findings, their implications for taxpayers, and the collective bargaining reforms that could significantly reduce costs at the state and local government level.

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*The*



*Heritage Foundation*

*~ Research Release ~*

# **How Collective Bargaining Affects State and Local Government Finances**

*Featuring*

**Geoffrey Lawrence**

Assistant State Controller of Nevada  
and former Director of Research, Nevada Policy Research Institute

**Ben Wilterdink**

Director of the Commerce, Insurance, and Economic Development Task Force,  
American Legislative Exchange Council

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Senior Statistician and Research Programmer, The Heritage Foundation

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**James Sherk**

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News media inquiries, call (202) 675-1761

**214 Massachusetts Avenue, NE | Washington, DC 20002 | (202) 546-4400**

**From:** [Sherk, James](#)  
**Subject:** FW: Productivity and Pay: Do Workers Enjoy the Fruits of their Labor?  
**Date:** Thursday, May 19, 2016 8:36:14 AM  
**Attachments:** [image001.png](#)  
[Productivity.doc](#)

---

Friends,

Heritage will be releasing new research on Tuesday, May 31<sup>st</sup> examining the claim that workers no longer benefit from productivity growth. We find that studies that come to this conclusion make three mistakes:

1. They compare the productivity and pay of different groups of workers;
2. They include the productivity growth of the self-employed, but ignore the pay growth of the self-employed;
3. They adjust pay and productivity for inflation differently.

Correcting these mistakes shows pay growth has closely followed productivity growth since the 1970s. We are hosting a lunchtime event with researchers from the Mercatus Center and Manhattan Institute to discuss these findings. I hope you can make it, or watch online.

Best,

James

---

**James Sherk**  
*Research Fellow, Labor Economics*  
*Institute for Economic Freedom and Opportunity*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)

---

**From:** Hilboldt, John  
**Sent:** Wednesday, May 18, 2016 1:07 PM  
**To:** Hilboldt, John  
**Subject:** Productivity and Pay: Do Workers Enjoy the Fruits of their Labor?

**See attached. Pleased distribute to all appropriate departmental and personal mailing lists. Thank you.**

## Productivity and Pay: Do Workers Enjoy the Fruits of their Labor?

*Featuring*

**Scott Winship**

Walter B. Wriston Fellow, Manhattan Institute

**Veronique de Rugy**

Senior Research Fellow, Mercatus Center

*Hosted by*

**James Sherk**

Research Fellow, Labor Economics, Center for Data Analysis, The Heritage Foundation

Do workers enjoy the fruits of their labor? Economic theory predicts that firms pay workers according to their productivity. Some analysts argue this no longer happens in the United States. They contend that workers' pay has stagnated for the past generation despite large increases in productivity. This belief drives much of the Obama Administration's regulatory agenda. Labor Secretary Tom Perez explains the newly released salaried overtime regulations are intended ensure that "as we have productivity and profitability in this country, that is shared between business and workers."

New research from The Heritage Foundation finds that is already happening. Since 1973 average hourly labor productivity has grown 81 percent. Over the same period employees' average hourly compensation has grown 78 percent. Employee pay closely tracks productivity growth. The studies finding otherwise compare the productivity and pay of different groups of workers, adjust pay and productivity for inflation differently, and contain mathematical errors. These factors cause the apparent gap between pay and productivity reported.

Join us as the author of this report and researchers from the Mercatus Center and Manhattan Institute discuss these findings and their implications for the economy.

**Tuesday, May 31, 2016 at 12:00 p.m.**

**The Heritage Foundation's Lehrman Auditorium**

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*The*



*Heritage Foundation*

# Productivity and Pay: Do Workers Enjoy the Fruits of their Labor?

*Featuring*

**Scott Winship**

Walter B. Wriston Fellow, Manhattan Institute

**Veronique de Rugy**

Senior Research Fellow, Mercatus Center

*Hosted by*

**James Sherk**

Research Fellow, Labor Economics, Center for Data Analysis, The Heritage Foundation

Do workers enjoy the fruits of their labor? Economic theory predicts that firms pay workers according to their productivity. Some analysts argue this no longer happens in the United States. They contend that workers' pay has stagnated for the past generation despite large increases in productivity. This belief drives much of the Obama Administration's regulatory agenda. Labor Secretary Tom Perez explains the newly released salaried overtime regulations are intended ensure that "as we have productivity and profitability in this country, that is shared between business and workers."

New research from The Heritage Foundation finds that is already happening. Since 1973 average hourly labor productivity has grown 81 percent. Over the same period employees' average hourly compensation has grown 78 percent. Employee pay closely tracks productivity growth. The studies finding otherwise compare the productivity and pay of different groups of workers, adjust pay and productivity for inflation differently, and contain mathematical errors. These factors cause the apparent gap between pay and productivity reported.

Join us as the author of this report and researchers from the Mercatus Center and Manhattan Institute discuss these findings and their implications for the economy.

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**214 Massachusetts Avenue, NE | Washington, DC 20002 | (202) 546-4400**

**From:** [Sherk, James](#)  
**Subject:** New Heritage Study on \$15 Federal Minimum Wage Would Cost 7 Million Jobs  
**Date:** Tuesday, July 26, 2016 12:26:16 PM

---

Friends,

I thought you might be interested to know Heritage released a report analyzing Sen. Sander's proposal to raise the minimum wage to \$15/hour over four years. Our key findings are:

- A federal \$15 mandate would eliminate 7 net million jobs, over and above those cost by states like California and New York going to \$15;
- At \$15 the minimum wage would cover one-third of wage and salary workers in the U.S.;
- Total full-time hiring costs would rise to at least \$18.61/hour. That includes the new minimum, plus payroll taxes and the ACA penalty.

You can find the full report here: <http://www.heritage.org/research/reports/2014/09/higher-fast-food-wages-higher-fast-food-prices>

James

---

**James Sherk**  
*Research Fellow, Labor Economics*  
*Institute for Economic Freedom and Opportunity*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6177  
[heritage.org](http://heritage.org)



**From:** [Davis, Daniel](#)  
**To:** [Ryan Hughes](#)  
**Cc:** [jfadness@scottwalker.com](mailto:jfadness@scottwalker.com); [Evenson, Tom - GOV](#)  
**Subject:** RE: Press Contact  
**Date:** Wednesday, March 1, 2017 3:34:50 PM

---

Terrific, thanks Ryan. I'll follow up with Tom Evenson separately. Appreciate the help.

---

**Daniel Davis**  
*Commentary Editor*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-1518  
[heritage.org](http://heritage.org)

---

**From:** Ryan Hughes [<mailto:ryan@bonjeancompany.com>]  
**Sent:** Tuesday, February 28, 2017 8:26 PM  
**To:** Davis, Daniel  
**Cc:** [jfadness@scottwalker.com](mailto:jfadness@scottwalker.com); [tom.evenson@wisconsin.gov](mailto:tom.evenson@wisconsin.gov)  
**Subject:** RE: Press Contact

Hey Daniel:

Hope all is well – the best press contact at Governor Walker's state office is probably Tom Evenson, Deputy Communications Director to the Governor (cc'd here) and the best person on his campaign side is Joe Fadness, the Governor's political advisor (also cc'd here). Please let us know if there's anything more we can do to help.

Best,

**Ryan Hughes | Account Executive**

**The Bonjean Company**

1701 K Street, NW, Suite 650 | Washington, D.C. 20006  
P: 224-723-8688  
[ryan@bonjeancompany.com](mailto:ryan@bonjeancompany.com) | [www.bonjeancompany.com](http://www.bonjeancompany.com)  
[www.Linkedin.com/in/RyanPatrickHughes](http://www.Linkedin.com/in/RyanPatrickHughes)

---

**From:** Davis, Daniel [<mailto:Daniel.Davis@heritage.org>]  
**Sent:** Tuesday, February 28, 2017 3:55 PM  
**To:** [ryan@bonjeancompany.com](mailto:ryan@bonjeancompany.com)  
**Subject:** Press Contact

Hi Ryan,

I'm Daniel from The Daily Signal. Our mutual friend Fred Lucas gave me your contact.

I was wondering if you might have on hand the press contact for Governor Scott Walker. I'm interested in seeing if Gov. Walker would be interested in writing an op-ed for The Daily Signal. Any contact info would be very much appreciated!

Best,  
Daniel

---

**Daniel Davis**

*Commentary Editor*

The Heritage Foundation

214 Massachusetts Avenue, NE

Washington, DC 20002

202-608-1518

[heritage.org](http://heritage.org)

**From:** [Davis, Daniel](#)  
**To:** [Evenson, Tom - GOV](#)  
**Subject:** RE: Op-ed for The Daily Signal?  
**Date:** Thursday, March 2, 2017 12:55:55 PM

---

Hi Tom,

Just wanted to circle back and see if the Governor would have any interest in this op-ed. I'm happy to discuss further if you'd like.

Best,  
Daniel

---

**Daniel Davis**  
*Commentary Editor*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-1518  
[heritage.org](http://heritage.org)

---

**From:** Davis, Daniel  
**Sent:** Wednesday, March 01, 2017 4:38 PM  
**To:** [tom.evenson@wisconsin.gov](mailto:tom.evenson@wisconsin.gov)  
**Subject:** Op-ed for The Daily Signal?

Hi Tom,

This is Daniel from The Daily Signal, the news and commentary site of The Heritage Foundation. I had the privilege of watching Gov. Walker speak at CPAC last week, and I wanted to ask if he'd be interested in publishing an op-ed with us on why, from his perspective as a governor, Congress should repeal Obamacare in full. I think this would be especially powerful coming from him since he did not take the Medicaid expansion in Wisconsin. Would the Governor have any interest in this?

Happy to discuss further if you would like.

Best,  
Daniel

**From:** [Evenson, Tom - GOV](#)  
**To:** [Davis, Daniel](#)  
**Subject:** RE: Op-ed for The Daily Signal?  
**Date:** Friday, March 3, 2017 9:20:00 AM

---

Hi Daniel –

Thanks for reaching out. I will take a look and get back to you. TE

---

**From:** Davis, Daniel [mailto:[Daniel.Davis@heritage.org](mailto:Daniel.Davis@heritage.org)]  
**Sent:** Wednesday, March 01, 2017 3:38 PM  
**To:** Evenson, Tom - GOV  
**Subject:** Op-ed for The Daily Signal?

Hi Tom,

This is Daniel from The Daily Signal, the news and commentary site of The Heritage Foundation. I had the privilege of watching Gov. Walker speak at CPAC last week, and I wanted to ask if he'd be interested in publishing an op-ed with us on why, from his perspective as a governor, Congress should repeal Obamacare in full. I think this would be especially powerful coming from him since he did not take the Medicaid expansion in Wisconsin. Would the Governor have any interest in this?

Happy to discuss further if you would like.

Best,  
Daniel

---

**Daniel Davis**  
*Commentary Editor*  
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214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-1518  
[heritage.org](http://heritage.org)

**From:** [Suhr, Daniel R - LTGOV](#)  
**To:** [ryan.nichols@heritage.org](mailto:ryan.nichols@heritage.org)  
**Subject:** Lt. Gov. Kleefisch Visit  
**Date:** Wednesday, March 8, 2017 4:06:00 PM

---

Hi Ryan,

Wisconsin's Lt. Governor Rebecca Kleefisch is visiting DC next week and had some time come open on her schedule. She asked me to reach out to you to see if Becky Norton Dunlop or Stephen Moore would be free to meet with her on Wednesday, March 15 (between 3:30-4:30pm), or Thursday, March 16 (morning doable, but prefer 2pm to 7:30pm).

Thanks,  
DANIEL

Daniel R. Suhr, Chief of Staff  
Lt. Governor Rebecca Kleefisch  
608.266.3516 (office)

**From:** [Hasenberg, Amy - GOV](#)  
**To:** [Lucas, Fred](#); [Fred Lucas \(DailySignal\)](#)  
**Subject:** RE: Gov. Walker  
**Date:** Friday, February 2, 2018 10:10:00 AM  
**Attachments:** [image001.png](#)  
[image002.png](#)  
[image003.png](#)  
[image004.png](#)  
[image005.png](#)  
[image006.png](#)  
[image007.png](#)

---

Hi Lucas,

Sorry about that: Try. Steve Michels ([Steven.Michels@wisconsin.gov](mailto:Steven.Michels@wisconsin.gov))

---

**From:** Lucas, Fred [<mailto:Fred.Lucas@heritage.org>]  
**Sent:** Friday, February 02, 2018 10:09 AM  
**To:** Hasenberg, Amy - GOV <[Amy.Hasenberg@wisconsin.gov](mailto:Amy.Hasenberg@wisconsin.gov)>; Fred Lucas (DailySignal) <[Fred.Lucas@dailysignal.com](mailto:Fred.Lucas@dailysignal.com)>  
**Subject:** RE: Gov. Walker

Thanks. I got a bounce back on that. I already sent again with an extra dot, but just wanted to confirm the address with you.

[Steven.M.Michels@wisconsin.gov](mailto:Steven.M.Michels@wisconsin.gov)

---

**Fred Lucas**

*White House Correspondent*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
703-859-1836  
[heritage.org](http://heritage.org)

---

**From:** Hasenberg, Amy - GOV [<mailto:Amy.Hasenberg@wisconsin.gov>]  
**Sent:** Friday, February 2, 2018 10:20 AM  
**To:** Fred Lucas (DailySignal) <[Fred.Lucas@dailysignal.com](mailto:Fred.Lucas@dailysignal.com)>  
**Subject:** Gov. Walker

Hi Fred,

I was told about your inquiry. I'm going to refer you over to Steve Michels with DOA:  
[StevenM.Michels@wisconsin.gov](mailto:StevenM.Michels@wisconsin.gov)

**Amy Hasenberg**

Press Secretary  
Office of Governor Scott Walker  
(608) 266-1212

[Amy.Hasenberg@wisconsin.gov](mailto:Amy.Hasenberg@wisconsin.gov)



















**From:** [Hasenberg, Amy - GOV](#)  
**To:** [Lucas, Fred](#)  
**Subject:** RE: Civil Service Reform and what DC can learn from Wisconsin  
**Date:** Wednesday, May 30, 2018 10:07:00 AM  
**Attachments:** [image007.png](#)  
[image008.png](#)  
[image009.png](#)  
[image010.png](#)  
[image011.png](#)  
[image012.png](#)

---

Hi Lucas,

Please reach out to Steve: [Steven.Michels@wisconsin.gov](mailto:Steven.Michels@wisconsin.gov)

---

**From:** Lucas, Fred <[Fred.Lucas@heritage.org](mailto:Fred.Lucas@heritage.org)>  
**Sent:** Wednesday, May 30, 2018 10:04 AM  
**To:** Hasenberg, Amy - GOV <[Amy.Hasenberg@wisconsin.gov](mailto:Amy.Hasenberg@wisconsin.gov)>  
**Cc:** [Steven.M.Michels@wisconsin.gov](mailto:Steven.M.Michels@wisconsin.gov)  
**Subject:** Civil Service Reform and what DC can learn from Wisconsin

Hello.

I tried to contact someone with the governor's office a couple of months back on the results of your civil service reforms.

Was overtaken by news events, but hoped to circle back in light of President Trump's recent executive orders on civil service reform.

Wisconsin led the way in 2011 in reining in public employees and I hoped to talk to someone.

The story I'm hoping to do would involve as much data as you would have available. This would include:

How many bad employees were fired? (As objective as "bad" can be, meaning criminality, brazen unprofessional misconduct, or other instances where people could keep their jobs regardless under the older system.)

How much money has been saved by the state?

Or any other numbers or data that would point to a success story.

I would appreciate any response or any number you would have. I am also interested in any interview you could set up.

Thank you.

**Fred Lucas**  
*White House Correspondent*  
The Daily Signal  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
703-859-1836  
[heritage.org](http://heritage.org)

---

**Fred Lucas**

*White House Correspondent*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
703-859-1836  
[heritage.org](http://heritage.org)

---

**From:** Hasenberg, Amy - GOV <[Amy.Hasenberg@wisconsin.gov](mailto:Amy.Hasenberg@wisconsin.gov)>  
**Sent:** Friday, February 2, 2018 11:11 AM  
**To:** [Fred.Lucas@heritage.org](mailto:Fred.Lucas@heritage.org); [Fred.Lucas@daily.signal.com](mailto:Fred.Lucas@daily.signal.com)  
**Subject:** RE: Gov. Walker

Hi Lucas,

Sorry about that: Try. Steve Michels ([Steven.Michels@wisconsin.gov](mailto:Steven.Michels@wisconsin.gov))

---

**From:** Lucas, Fred [<mailto:Fred.Lucas@heritage.org>]  
**Sent:** Friday, February 02, 2018 10:09 AM  
**To:** Hasenberg, Amy - GOV <[Amy.Hasenberg@wisconsin.gov](mailto:Amy.Hasenberg@wisconsin.gov)>; Fred Lucas (DailySignal) <[Fred.Lucas@daily.signal.com](mailto:Fred.Lucas@daily.signal.com)>  
**Subject:** RE: Gov. Walker

Thanks. I got a bounce back on that. I already sent again with an extra dot, but just wanted to confirm the address with you.

[Steven.M.Michels@wisconsin.gov](mailto:Steven.M.Michels@wisconsin.gov)

---

**Fred Lucas**

*White House Correspondent*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
703-859-1836  
[heritage.org](http://heritage.org)

---

**From:** Hasenberg, Amy - GOV [<mailto:Amy.Hasenberg@wisconsin.gov>]  
**Sent:** Friday, February 2, 2018 10:20 AM  
**To:** Fred Lucas (DailySignal) <[Fred.Lucas@daily.signal.com](mailto:Fred.Lucas@daily.signal.com)>  
**Subject:** Gov. Walker

Hi Fred,



I was told about your inquiry. I'm going to refer you over to Steve Michels with DOA:  
[StevenM.Michels@wisconsin.gov](mailto:StevenM.Michels@wisconsin.gov)

**Amy Hasenberg**

Press Secretary

Office of Governor Scott Walker

(608) 266-1212

[Amy.Hasenberg@wisconsin.gov](mailto:Amy.Hasenberg@wisconsin.gov)















From: [Nupson, Kristen - LTGOV](#)  
To: [Sally, Daniel R. - GOV](#)  
Subject: Fri: Meeting  
Date: Tuesday, September 18, 2018 7:58:07 AM

From: Imoehl, James <James.Imoehl@heritage.org>  
Sent: Tuesday, September 18, 2018 7:49 AM  
To: Nupson, Kristen - LTGOV; cmitchell@foley.com; Wright, Kathy (McConnell)  
Cc: Heather R Higgins; James, Kay; mdannenfelser@sbalist.org; [REDACTED]; Molly Zinzi; Sailor, Angela  
Subject: RE: Meeting

Below is the call-in information for this evenings call at **5:30 P.M. EST.**

- Phone Number: 844-397-8472  
Conference Code: [REDACTED]  
Custom Participant Id: [REDACTED]

James Imoehl

Deputy Chief of Staff to the President  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6038  
[he.imoehl@foley.com](mailto:he.imoehl@foley.com)

From: Nupson, Kristen - LTGOV <Kristen.Nupson@wisconsin.gov>

Sent: Tuesday, September 18, 2018 8:39 AM

To: cmitchell@foley.com; Wright, Kathy (McConnell) <kathy\_wright@mcconnell.senate.gov>

Cc: Heather R Higgins <hrh@afstrat.net>; Imoehl, James <James.Imoehl@heritage.org>; James, Kay <Kay.James@heritage.org>; mdannenfelser@sbalist.org; [REDACTED]; Molly Zinzi <mzinzi@sbalist.org>; Sailor, Angela <Angela.Sailor@heritage.org>

Subject: Re: Meeting

Yes; Lt. Governor Kleefisch can do 5:30 EST conference call.

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From: [cmitchell@foley.com](#)

Sent: Tuesday, September 18, 2018 7:36 AM

To: Wright, Kathy (McConnell)

Cc: Heather R Higgins; Imoehl, James; James, Kay; [mdannenfelser@sbalist.org](#); [REDACTED]; Molly Zinzi; Sailor, Angela; Nupson, Kristen - LTGOV

Subject: Re: Meeting

Great! We definitely need to do a call.

Cleta Mitchell, Esq.  
Foley & Lardner LLP  
[cmitchell@foley.com](mailto:cmitchell@foley.com); [cmitchell@foley.com](mailto:cmitchell@foley.com)  
202.431.1950 (cell)  
202.295.4081 (office)  
Sent from my iPhone

On Sep 18, 2018, at 8:24 AM, Wright, Kathy (McConnell) <[Kathy\\_Wright@mcconnell.senate.gov](mailto:Kathy_Wright@mcconnell.senate.gov)> wrote:

Note: Kay was officially appointed on Friday...the WH told GSA yesterday.  
I will verify today.  
KWW

From: Heather R Higgins <[HRH@afstrat.net](mailto:HRH@afstrat.net)>; Imoehl, James <[James.Imoehl@heritage.org](mailto:James.Imoehl@heritage.org)>; Wright, Kathy (McConnell) <[Kathy\\_Wright@mcconnell.senate.gov](mailto:Kathy_Wright@mcconnell.senate.gov)>

Sent: Monday, September 17, 2018 9:06 PM

To: [CMitchell@foley.com](mailto:CMitchell@foley.com); [CMitchell@foley.com](mailto:CMitchell@foley.com); Imoehl, James <[James.Imoehl@heritage.org](mailto:James.Imoehl@heritage.org)>; Wright, Kathy (McConnell) <[Kathy\\_Wright@mcconnell.senate.gov](mailto:Kathy_Wright@mcconnell.senate.gov)>

Cc: James, Kay <[Kay.James@heritage.org](mailto:Kay.James@heritage.org)>; [mdannenfelser@sbalist.org](mailto:mdannenfelser@sbalist.org); [mdannenfelser@sbalist.org](mailto:mdannenfelser@sbalist.org); [REDACTED]; Molly Zinzi <[MZinzi@sbalist.org](mailto:MZinzi@sbalist.org)>; Sailor, Angela <[Angela.Sailor@heritage.org](mailto:Angela.Sailor@heritage.org)>; [Kristen.Nupson@wisconsin.gov](mailto:Kristen.Nupson@wisconsin.gov); [Kristen.Nupson@wisconsin.gov](mailto:Kristen.Nupson@wisconsin.gov)

Subject: RE: Meeting

ok

From: [CMitchell@foley.com](mailto:CMitchell@foley.com); [CMitchell@foley.com](mailto:CMitchell@foley.com) <[CMitchell@foley.com](mailto:CMitchell@foley.com)>

Sent: Monday, September 17, 2018 8:42 PM

To: Imoehl, James <[James.Imoehl@heritage.org](mailto:James.Imoehl@heritage.org)>; Wright, Kathy (McConnell) <[Kathy\\_Wright@mcconnell.senate.gov](mailto:Kathy_Wright@mcconnell.senate.gov)>

Cc: James, Kay <[Kay.James@heritage.org](mailto:Kay.James@heritage.org)>; [mdannenfelser@sbalist.org](mailto:mdannenfelser@sbalist.org); [mdannenfelser@sbalist.org](mailto:mdannenfelser@sbalist.org); [REDACTED]; Heather R Higgins <[HRH@afstrat.net](mailto:HRH@afstrat.net)>; Molly Zinzi <[MZinzi@sbalist.org](mailto:MZinzi@sbalist.org)>; Sailor, Angela <[Angela.Sailor@heritage.org](mailto:Angela.Sailor@heritage.org)>; [Kristen.Nupson@wisconsin.gov](mailto:Kristen.Nupson@wisconsin.gov); [Kristen.Nupson@wisconsin.gov](mailto:Kristen.Nupson@wisconsin.gov)

Subject: RE: Meeting

Can people do 5:30 p.m. on Tuesday (tomorrow)?

Does that work for Gov Kleefisch?

Cleta Mitchell  
Foley & Lardner LLP  
3000 K Street, N.W. | Suite 600  
Washington, DC 20007-5109  
P 202.295.4081  
C 202.431.1950  
[cmitchell@foley.com](mailto:cmitchell@foley.com)

View My Bio <[http://secure.web.cisco.com/1JN8b1q2P7Zx4Gd1u75p\\_Wd6A97CM0JnS7J1U0DWDw2gpaB5mzG3wvrfesTtLvs7Xlbal4DI2BR0GR18\\_HtckEgA1U0448tMAK8yXmeh8Edt8r6nDbbkclUeWQs0s\\_E0DlHpsW7UpKLQcGAxvWm7sPNZ2RdEz66mUmNlMFwz9D13QyOhE9d7Dk0a-3rDs0WpP3AkWKE\\_oMyWbxyaCRL9FEHYEV72TpY12IuqFmNeRTU47on\\_S\\_igbY5SMJH74w](http://secure.web.cisco.com/1JN8b1q2P7Zx4Gd1u75p_Wd6A97CM0JnS7J1U0DWDw2gpaB5mzG3wvrfesTtLvs7Xlbal4DI2BR0GR18_HtckEgA1U0448tMAK8yXmeh8Edt8r6nDbbkclUeWQs0s_E0DlHpsW7UpKLQcGAxvWm7sPNZ2RdEz66mUmNlMFwz9D13QyOhE9d7Dk0a-3rDs0WpP3AkWKE_oMyWbxyaCRL9FEHYEV72TpY12IuqFmNeRTU47on_S_igbY5SMJH74w)>  
Visit [http://secure.web.cisco.com/1m1WYuvuvokfLdHfXJaAklUoNFbHQLQjkh10bWv5GTT78wPzOim2WfUxteudkMsp9Q75XpmAuXFdmStG9fLd5ioqKl6zLpMnoXMQqdCN2jdmX3sw2BecXLU2zv2diXAyvk1BLDz6GEYVX\\_NX77deImcV5\\_N\\_nKtS62JdlEasBhJORTKs9sw8qU3sdWx8GHGj-gjTTiNSA8kcOuAxbwTNUH-w344dZatAbHDo9dPzmYppim-EhO3wR0\\_acXatylLM3S7erCg](http://secure.web.cisco.com/1m1WYuvuvokfLdHfXJaAklUoNFbHQLQjkh10bWv5GTT78wPzOim2WfUxteudkMsp9Q75XpmAuXFdmStG9fLd5ioqKl6zLpMnoXMQqdCN2jdmX3sw2BecXLU2zv2diXAyvk1BLDz6GEYVX_NX77deImcV5_N_nKtS62JdlEasBhJORTKs9sw8qU3sdWx8GHGj-gjTTiNSA8kcOuAxbwTNUH-w344dZatAbHDo9dPzmYppim-EhO3wR0_acXatylLM3S7erCg)>  
<image001.jpg>

From: Imoehl, James [<mailto:James.Imoehl@heritage.org>]

Sent: Monday, September 17, 2018 6:52 PM

To: Wright, Kathy (McConnell); Mitchell, Cleta

Cc: James, Kay; [mdannenfelser@sbalist.org](mailto:mdannenfelser@sbalist.org); [REDACTED]; [HRH@afstrat.net](mailto:HRH@afstrat.net); Molly Zinzi; Sailor, Angela; [Kristen.Nupson@wisconsin.gov](mailto:Kristen.Nupson@wisconsin.gov); [Kristen.Nupson@wisconsin.gov](mailto:Kristen.Nupson@wisconsin.gov)

Subject: RE: Meeting

I am also happy to schedule a conference call on Tuesday or Wednesday if that works better for everyone.

James Imoehl

Deputy Chief of Staff to the President  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6038

[https://secure.web.cisco.com/15BkQoMc3TOX8C-NwL8hYmERX22aOitWNwPY7pe6vOis8xrvZdelsEngOvrUdLhs3YdBeFkgQC1XEMrLUS2J9WC4RGoAJiaJ1SGGhF55JJa6vdtL38c53MCMRd2YKpCC\\_Y4cyKEsM15-6WacoMgip8E\\_cXlhbYXylwJvJW3Xp09n6xLUaUATySGFRONqF71kdKMiOnp1XezJzOYorAKSSj6BxMsMTEU1U01lPnlcWUxv2gvoKv0VILX0IM3\\_2m\\_Axi3COn\\_WKw](https://secure.web.cisco.com/15BkQoMc3TOX8C-NwL8hYmERX22aOitWNwPY7pe6vOis8xrvZdelsEngOvrUdLhs3YdBeFkgQC1XEMrLUS2J9WC4RGoAJiaJ1SGGhF55JJa6vdtL38c53MCMRd2YKpCC_Y4cyKEsM15-6WacoMgip8E_cXlhbYXylwJvJW3Xp09n6xLUaUATySGFRONqF71kdKMiOnp1XezJzOYorAKSSj6BxMsMTEU1U01lPnlcWUxv2gvoKv0VILX0IM3_2m_Axi3COn_WKw)>  
3A\_heritage.org\_&d\_DaMGaQ&c\_Rln5WhGmPer8spDE4r86Q&r\_VgoRkeE\_5TD134e\_lBnF\_FE23QDP77Z5Mplq&armE&m\_o9n15h9Q\_37s9DMwadu3GA4\_28dRRQKlaAL7am&ks\_7yYaHqqlask7-4ndDyrcUd8-eyy02Vbl7X2HOXAQ70&c>

From: Wright, Kathy (McConnell) <[Kathy\\_Wright@mcconnell.senate.gov](mailto:Kathy_Wright@mcconnell.senate.gov)>

Sent: Monday, September 17, 2018 6:50 PM

To: 'C[Mitchell@foley.com;mailto:CMitchell@foley.com]' <[CMitchell@foley.com](mailto:CMitchell@foley.com)>; Imoehl, James <[James.Imoehl@heritage.org](mailto:James.Imoehl@heritage.org)>

Cc: James, Kay <[Kay.James@heritage.org](mailto:Kay.James@heritage.org)>; [mdannenfelser@sbalist.org](mailto:mdannenfelser@sbalist.org); [REDACTED]; [HRH@afstrat.net](mailto:HRH@afstrat.net); Molly Zinzi <[MZinzi@sbalist.org](mailto:MZinzi@sbalist.org)>; Sailor, Angela <[Angela.Sailor@heritage.org](mailto:Angela.Sailor@heritage.org)>; [Kristen.Nupson@wisconsin.gov](mailto:Kristen.Nupson@wisconsin.gov); [Kristen.Nupson@wisconsin.gov](mailto:Kristen.Nupson@wisconsin.gov)

Subject: RE: Meeting

Oh my...I thought you were in town this week for some reason.

I can do this but happy to have a call as well....KWW

-----Original Message-----

From: [CMitchell@foley.com](mailto:CMitchell@foley.com); [CMitchell@foley.com](mailto:CMitchell@foley.com) <[CMitchell@foley.com](mailto:CMitchell@foley.com)>

Sent: Monday, September 17, 2018 6:33 PM

To: Imoehl, James <[James.Imoehl@heritage.org](mailto:James.Imoehl@heritage.org)>

Cc: Wright, Kathy (McConnell) <[Kathy\\_Wright@mcconnell.senate.gov](mailto:Kathy_Wright@mcconnell.senate.gov)>; James, Kay <[Kay.James@heritage.org](mailto:Kay.James@heritage.org)>; [mdannenfelser@sbalist.org](mailto:mdannenfelser@sbalist.org); [REDACTED]; [HRH@afstrat.net](mailto:HRH@afstrat.net); Molly Zinzi <[MZinzi@sbalist.org](mailto:MZinzi@sbalist.org)>; Sailor, Angela <[Angela.Sailor@heritage.org](mailto:Angela.Sailor@heritage.org)>; [Kristen.Nupson@wisconsin.gov](mailto:Kristen.Nupson@wisconsin.gov); [Kristen.Nupson@wisconsin.gov](mailto:Kristen.Nupson@wisconsin.gov)

Subject: Re: Meeting



Thank you, James.

But I am not in DC this week - I can do a conference call.

Let me know, Cleta

Cleta Mitchell, Esq.  
Foley & Lardner, LLP  
[cmitchell@foley.com](mailto:cmitchell@foley.com) <<mailto:cmitchell@foley.com>> <<mailto:cmitchell@foley.com>>  
202.431.1950 (cell)  
202.295.4081 (office)  
Sent from my iPhone

On Sep 17, 2018, at 6:26 PM, Imoehl, James <[James.Imoehl@heritage.org](mailto:James.Imoehl@heritage.org)> <<mailto:James.Imoehl@heritage.org>> wrote:

Good Evening,

My name is James Imoehl, I am Mrs. Kay James's Deputy Chief of Staff. Mrs. James has asked me to reach out to schedule a meeting amongst the group of people on this email.

We are hoping to have this meeting tomorrow, Tuesday, sometime between 4:30 p.m. and 6:45 p.m. Mrs. James is happy to host this meeting at Heritage. We will provide refreshments.

Please let me know your availability or share my contact information with your Executive Assistants and we will go from there.

Best Regards,  
James

---

James Imoehl  
Deputy Chief of Staff to the President  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6038  
[heritage.org](http://secure.web.cisco.com/1Vq55QwjaSXNa5uf28tStaUbPD7_FzSo5MZTNC93ymRITOSLHgE7iY7SEfwnRldw0x7sAIHHcDpROR6to_0fEV0brByMIQLE9nW6cmFN8ODoUkth_JSylOP2tqymHky70lb6hYNRQ8o01Z4iZn1mNl7Jl_FEEdljyJnllLgQOdLcooOyTdZQe9-4ozYD-1Y5Plc-RpnaCKjXyH6SpScrgmfaQE0-HqM8TaupsfXW9lSoQnEd5MmgZUWVhwJFMKUUnEW17DKGGRBPPZABHKBmw0Ahttp://heritage.org) <[http://secure.web.cisco.com/1Vq55QwjaSXNa5uf28tStaUbPD7\\_FzSo5MZTNC93ymRITOSLHgE7iY7SEfwnRldw0x7sAIHHcDpROR6to\\_0fEV0brByMIQLE9nW6cmFN8ODoUkth\\_JSylOP2tqymHky70lb6hYNRQ8o01Z4iZn1mNl7Jl\\_FEEdljyJnllLgQOdLcooOyTdZQe9-4ozYD-1Y5Plc-RpnaCKjXyH6SpScrgmfaQE0-HqM8TaupsfXW9lSoQnEd5MmgZUWVhwJFMKUUnEW17DKGGRBPPZABHKBmw0Ahttp://heritage.org](http://secure.web.cisco.com/1Vq55QwjaSXNa5uf28tStaUbPD7_FzSo5MZTNC93ymRITOSLHgE7iY7SEfwnRldw0x7sAIHHcDpROR6to_0fEV0brByMIQLE9nW6cmFN8ODoUkth_JSylOP2tqymHky70lb6hYNRQ8o01Z4iZn1mNl7Jl_FEEdljyJnllLgQOdLcooOyTdZQe9-4ozYD-1Y5Plc-RpnaCKjXyH6SpScrgmfaQE0-HqM8TaupsfXW9lSoQnEd5MmgZUWVhwJFMKUUnEW17DKGGRBPPZABHKBmw0Ahttp://heritage.org)> <[https://secure.web.cisco.com/1eN5JcsohQqoY4QxPsmuSqz7TLy5xck9s1IOFjwShU2eDlX9JfF2\\_xMBgfceenx-qJrlchlPBgl\\_vFs0Z04kzwHWOvNaNHDA4MUw1CF3trWKRZ\\_DYPhZe\\_vDREbMl1m81JcEkQlPaQe\\_vYwlayK2cYGYdd7apmwxwLhrYnMWge2PMVqtSYKTYcZSWpkFAWesuncNo23\\_JmHl05jtU0xElvybpaTE2NmDRAPsYn7H4ASjmix6jaitWKSywwS3lhQ0umikJc52zRoFPhzE1ghttps://urldefense.proofpoint.com/v2/url?u=http-3A\\_\\_heritage.org-&d=DzMcGrQks\\_RlnSWJGmPE8smjDE488Q8r\\_Yp0RskE\\_5TDLJ3dg\\_0BafP\\_FE33QDEp7Z5Mplq8armE&m\\_w5pjhsOYYFLY\\_-nufGpOlmmPPRDGccvgs6THA1g8Wo&s\\_HUa\\_eNjWupv5iAYs\\_hBF6KwtBNgPzZ0bnp3LjwaNk&e\\_](https://secure.web.cisco.com/1eN5JcsohQqoY4QxPsmuSqz7TLy5xck9s1IOFjwShU2eDlX9JfF2_xMBgfceenx-qJrlchlPBgl_vFs0Z04kzwHWOvNaNHDA4MUw1CF3trWKRZ_DYPhZe_vDREbMl1m81JcEkQlPaQe_vYwlayK2cYGYdd7apmwxwLhrYnMWge2PMVqtSYKTYcZSWpkFAWesuncNo23_JmHl05jtU0xElvybpaTE2NmDRAPsYn7H4ASjmix6jaitWKSywwS3lhQ0umikJc52zRoFPhzE1ghttps://urldefense.proofpoint.com/v2/url?u=http-3A__heritage.org-&d=DzMcGrQks_RlnSWJGmPE8smjDE488Q8r_Yp0RskE_5TDLJ3dg_0BafP_FE33QDEp7Z5Mplq8armE&m_w5pjhsOYYFLY_-nufGpOlmmPPRDGccvgs6THA1g8Wo&s_HUa_eNjWupv5iAYs_hBF6KwtBNgPzZ0bnp3LjwaNk&e_)>

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**From:** [Grace, Julie - LTGOV](#)  
**To:** [Suhr, Daniel R - GOV](#)  
**Subject:** FW: Women's Suffrage Executive Director  
**Date:** Wednesday, October 31, 2018 1:53:18 PM  
**Attachments:** [Christina Culver Resume Aug 2018.pdf](#)

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Cleta's suggestion for the Executive Director position.

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**From:** Imoehl, James <James.Imoehl@heritage.org>  
**Sent:** Wednesday, October 31, 2018 1:52 PM  
**To:** Grace, Julie - LTGOV <Julie.Grace@wisconsin.gov>  
**Subject:** RE: Women's Suffrage Executive Director

Here you go! Thanks

---

**James Imoehl**

*Deputy Chief of Staff to the President*  
The Heritage Foundation  
214 Massachusetts Avenue, NE  
Washington, DC 20002  
202-608-6038  
[heritage.org](http://heritage.org)

---

**From:** Grace, Julie - LTGOV <[Julie.Grace@wisconsin.gov](mailto:Julie.Grace@wisconsin.gov)>  
**Sent:** Wednesday, October 31, 2018 12:34 PM  
**To:** Imoehl, James <[James.Imoehl@heritage.org](mailto:James.Imoehl@heritage.org)>  
**Subject:** Women's Suffrage Executive Director

Hi James,

Cleta Mitchell told me she sent you info on the person she had in mind for the Executive Director position for the Women's Suffrage Commission. She's unable to send it to me at this time, so would you mind forwarding it to me when you have a chance?

Thanks,  
Julie

Get [Outlook for iOS](#)

## **CHRISTINA ERLAND CULVER**

Washington, DC 20008

cell: [REDACTED]

Christina@ednexusadvisors.com

www.ednexusadvisors.com

Twitter: @wirededude

LinkedIn: <http://www.linkedin.com/in/christinaerlandculver/>

An experienced, effective senior executive manager who has leveraged in-depth, 30-year expertise earned working in the White House and federal agencies of two Presidential Administrations to provide government relations, public affairs and strategic advisory services representing a wide portfolio of companies, non-profits and venture philanthropy focused on education, technology and the new workforce economy.

**EDNEXUS ADVISORS, LLC** President, Washington, DC

**THOMPSON COBURN, LLP**, Strategic Partner, Washington, DC

2008 – present

Leads a widely-respected government affairs firm representing a wide portfolio of clients ranging from education to military families, technology, and infrastructure. Expert in creating innovative strategies to navigate the complexities of state and federal policy specifically in building national support and financial investment in entrepreneurship and transformation in learning for the new workforce economy. Strategic Partner with St. Louis headquartered, Thompson Coburn, LLP, government relations firm.

- Executive Director and Finance Director for Rebuilding America Now, independent expenditure political action committee (Super PAC) in support of Donald J. Trump for President, chaired by Florida Governor Rick Scott. Achieved raising \$23.6 million in 16 weeks June – November 2016. Manages fundraising operations, social media, advocacy, and donor relations for 2020.
- Senior Advisor to U.S. China Business Association to advance their Washington presence in support of \$50 billion in investment commitments in U.S. manufacturing and infrastructure.
- Managing Director of Verse Capital, LLC Education Technology Accelerator launched in December 2016 to provide expertise and counsel to early stage companies competing to scale in heavily regulated education and training marketplace.
- Senior strategic advisor to high performing New York City CMO, Success Academy, educating Congress and Executive Branch on need to increase funding and deregulate onerous policies preventing program growth and student access to quality schools.
- Senior policy advisor to Salt Lake City based School Improvement Network technology company for K-12 teachers and students. Advised in scaling the company from approximately 100 to 300 employees by providing strategic counsel to CEO and senior executives in marketing, branding, DC thought leadership, business development, product development, and sales. Analyzed federal and state policy as it impacted growth and sales. Developed and represented national strategic government and non-profit partnerships.
- Successfully developed and executed national advocacy effort for policy included in Every Student Succeeds Act (ESSA) including identifying bipartisan congressional support, building thought leadership, distribution of research, and engaging key stakeholder support.
- Provided effective strategic counsel for high net worth Idaho family foundation to revamp \$40 million in annual giving to Idaho education programs to advance their rural economy.

- Analyzed digital learning investment opportunities and provided guidance for grant making for a Wisconsin based foundation giving \$32 million annually.
- Featured speaker and panelist at national innovation and investment banking conferences for the education technology industry serving pre-K-12, higher education, and workforce training.

**REPUBLICAN CANDIDATE, DC CITY COUNCIL 2008, Ward 2, Washington, DC**

- Recruited by RNC Treasurer Tony Parker, DC Republican Committeeman Bob Kabel, and Committeewoman Nancy Werronen, to run as Republican Party Candidate for DC City Council, Ward 2 against 17-year Democratic incumbent, Jack Evans.
- As a first major candidate effort in years by DC Republicans, brought the DC party into broad recognition with the local and national press and paved the way for future candidates and party presence in the city. Received 17.3% of the vote (4,579 votes) and more votes than John McCain (3,619 votes) in Ward 2 with 6.15% Republican registration during a contentious 2008 election year.

**DUTKO WORLWIDE, Vice President, Washington, DC**

2006 –2008

- Provided strategic advisory, government relations, and public affairs services for homeland security and technology companies, foundations and non-profit clients at the federal, state and local levels.
- Developed public-private partnerships in high-impact giving through corporate social responsibility, venture philanthropy, and education programs leveraging federal and state government funding for greater impact and productivity, and creating markets for technology innovations and new policy programs. Clients included Wireless Generation, and Target Corporation.

**U.S. DEPARTMENT OF EDUCATION, Washington, DC**

2003-2006

Acting Assistant Secretary, Office of Intergovernmental and Interagency Affairs

Managing Director, Office of Communications and Outreach

- Managing a team of 105 employees, communicated Department's policies and Secretary's goals to ensure proper implementation among governors, chief state school officers, state departments of education, state legislators, interagency, and community groups.
- Facilitated the resolution of challenges and issues with states relating to new federal law.
- Substantially strengthened interagency collaboration.
- Created strategic partnerships that leveraged No Child Left Behind funding resulting in greater impact at the state and local level.

Deputy Assistant Secretary, Office of Intergovernmental and Interagency Affairs,

Regional Services Division

- Directed Office of Regional Services overseeing 50 employees, including headquarters staff, ten regional federal offices and appointed Secretary's Regional Representatives.
- Directed external relations, communications and outreach to fifty United States and territories to ensure federal K-12 education policies of the No Child Left Behind Act (NCLB) were

implemented at the state and local level.

- Coordinated with White House Intergovernmental Affairs to communicate with state elected officials across the country regarding the impact of NCLB implementation issues as well as the potential impact of NCLB related state legislative proposals. Responsible for tracking states with sensitive concerns, and making decisions and recommending responses to critical legislative activity resulting in no anti-NCLB bills passing into law.

Director, Constituent Relations, Office of Intergovernmental and Interagency Affairs

- Directed, created and coordinated strategic opportunities for dialogue between the administration and constituent organizations including national, state, and local associations, Fortune 500 corporations, education leaders, think tanks, foundations, and family organizations in order to improve public awareness and involvement in federal education policy, laws and initiatives.

**COMMITTEE FOR JUSTICE**, US Supreme Court Advocacy Organization, Washington, DC  
April – August 2003

- Consultant providing development, strategic planning, and outreach, for non-profit organization lead by C. Boyden Gray in support of US Supreme Court judicial nominations.

**CHILDREN FIRST AMERICA**, Vice President, Strategic Development, Washington, DC  
1998-2003

- Educated Members of Congress, White House, Governors and other elected leaders on the benefits of empowerment of low-income families, and other school choice education reform policies on behalf of national non-profit organization.
- Developed public affairs strategy to advance education reform public policy at the state and federal level, including building awareness for the organization and its issues among government, community and opinion leaders through publicity and special events.
- Events included: White House Oval Office meeting and event for low-income urban families to meet President Bush and launch his education reform package; rallies and advocacy for favorable US Supreme Court decision on *Zelman v. Simmons-Harris*.
- Managed national fundraising for \$10 million budget.

**NATIONAL REPUBLICAN SENATORIAL COMMITTEE**, Director, Presidential Roundtable  
Finance Division, Washington, DC, 1995-1997

- Planned and implemented \$3 million federal dollar major donor fundraising program.
- Developed and conducted semi-annual Washington policy forums hosted by U.S. Senators and other notable Republicans and policy experts.
- Planned and hosted donor delegation to the 1996 Republican National Convention in San Diego.
- Exceeded fundraising goals each year. Increased membership by 282%.

**ALEX. BROWN & SONS, INCORPORATED**, Baltimore, MD  
1993-1994

Administrator, Marketing and Client Services for Brown Asset Management Group

**U.S. DEPARTMENT OF EDUCATION, OFFICE OF THE SECRETARY**, Washington, DC

1990-1993

Confidential Assistant, Community Relations

- Advised business and community leaders on national education policy and how to set up their own local school reform organizations and education improvement initiatives.
- Developed and managed outreach strategy for broadcasting monthly town meetings to over 2,500 participating communities through satellite programming.
- Planned and promoted Wal-Mart Stores, Inc.'s corporate-government partnership to help families and community leaders get more involved in reforming their schools in over 2,000 Wal-Mart communities.
- Planned and staffed DOE training conferences held nationwide.

**THE WHITE HOUSE, OFFICE OF PRESIDENTIAL PERSONNEL**, Washington, DC

1989-1990

Confidential Assistant

- Reported to Special Assistant to the President, Associate Director for National Security Affairs.
- Assisted in researching, interviewing and recommending candidates for presidential appointments at the Department of Defense, State – including Ambassadorships, and other related agencies.
- Assisted in the selection and planning of presidential delegations to foreign countries.

**WHITE HOUSE PRESIDENTIAL TRANSITION**, Washington, DC

1988-1989

Administrative Assistant to Transition Personnel Director, Provided administrative support for Personnel Director in Presidential Transition office.

**BOB DOLE FOR PRESIDENT**, Washington, DC

January – May 1987

Full Time Intern to the Campaign Finance Director

#### **EDUCATION:**

**U.S. Naval War College**, Newport, RI/Washington, DC,

Masters of Arts in National Security and Strategic Studies, June 2008

**University of Kansas**, Lawrence, Kansas, B.A., Political Science, December 1987

#### **BOARDS, ADVISORY ROLES, AND VOLUNTEER POSITIONS:**

Washington Latin Public Charter School Board, Washington, DC 2013-present

Living Classrooms Foundation, Washington, DC, Board Member 2007-present

EdTech Women, Washington, DC, Co-Founder, 2013-present

Innovative Learning Stratagems, Inc., Lawrence, KS, Board member 1998-present

America's Future Foundation, Washington, DC, Advisory Board Member, 2005 – present

Supreme Court Historical Society Member 2017

President, DC League of Republican Women, Washington, DC, President - June 2009 – 2011

Mitt Romney for President, Education Advisory Committee, 2008, 2012

George W. Bush for President, GOTV in Pennsylvania and Ohio, 2000 and 2004

Dole for President, Intern to Finance Director, 1987-1988

Kansas Secretary of State, Intern, Summers 1984, 1986

**PUBLICATIONS:** Coauthor, Virtual Schooling: A Guide to Optimizing Your Child's Education – 2009